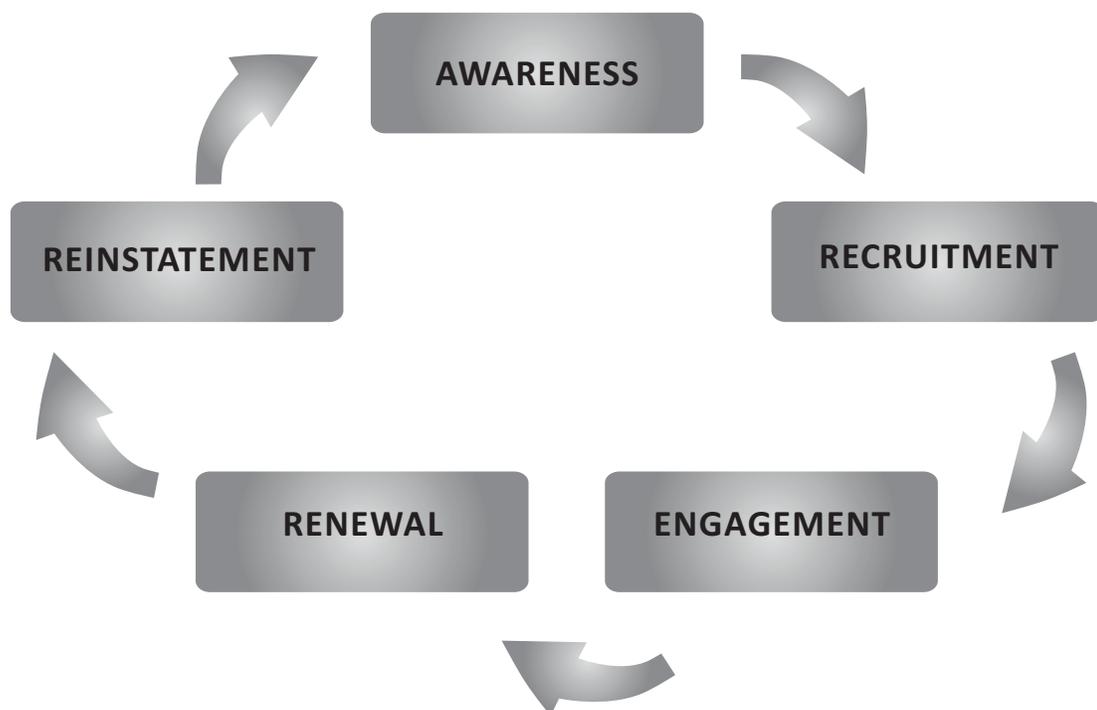


Among associations in the United States, the National Active and Retired Federal Employees Association (NARFE) is the only association that protects the earned benefits of *all* federal employees and retirees. NARFE is governed by a National Executive Board consisting of four national resident officers and 10 regional vice presidents. In addition, there are a Headquarters staff, several hundred chapters and 54 federations.

This manual provides a guide to membership marketing, which includes prospecting, recruitment, retention, participation and leadership.

Your comments and suggestions for future editions are appreciated and should be directed to the Recruitment and Retention Section at rr@narfe.org or by calling 800-627-3394.

THE NARFE MEMBERSHIP LIFECYCLE



The **Membership Lifecycle** begins with AWARENESS.

Increased awareness facilitates new member RECRUITMENT.

ENGAGEMENT strengthens member ties and improves RENEWAL rates.

The REINSTATEMENT of former members completes the cycle.

PROSPECTING AND RECRUITMENT

Prospecting/Recruitment Tips

An often-asked question is: “How can chapters and federations have greater success in the field when prospecting and/or recruiting?” The following provides useful guidance as you prepare for your prospecting and recruitment activities:

- Assess the resources within your chapter and/or federation. Are there funds, matching funds, successful recruiters or potential recruiters available?
- Assess the opportunities in your area, district and federation. Are there federal facilities or events that might offer prospecting/recruitment opportunities? Don't rule out an event without investigating the possibilities. Sometimes gatherings at first blush might seem unlikely when, in fact, they may be excellent venues.
- Utilize data contained within the M-112 (Monthly Chapter Activity Report) and the Online Activities Module (OAM). Prospects and new members are listed on both reports. Prepare a strategy to contact and engage these individuals.
- Do more than send a letter to prospects and new members. If funds for postage are available, include a *narfe* magazine and the F-135, NARFE Brochure.
- Develop a prospect follow-up plan over the next six months.
- New members are likely active employees or recent retirees. Welcome them; understand their unique needs and perspectives. They are your best potential recruiters.
- Seek and share expertise. Develop relationships with nearby chapter membership chairs and federation officers.
- Comb the quarterly *Recruitment and Retention Journals* for top recruiters in your area or district. Contact them and discuss strategies.
- Map out opportunities and best possible/available staffing. Set goal; order *narfe* magazines, F-135s and M2s (contact information cards) for event tables.
- Develop a personal “elevator speech” that strongly positions NARFE as the legislative voice and information resource for federal employees and retirees. (Samples available from Headquarters.)
- Identify, build and cultivate relationships within local federal agencies. Achieving success in gaining access to federal buildings and invitations to events within them is most often the result of cultivating personal relationships with key personnel over the long-term.
- Pursue outreach via social media. For those who are comfortable posting to social media sites (Facebook, Twitter, etc.) spreading the word about NARFE is effective public relations.
- For those who resist joining through local chapter membership, suggest they join through eNARFE.

Prospects include:

- Federal retirees
- Active federal employees (including congressional staff)
- Former federal employees (including individuals receiving disability retirement)
- Spouses and former spouses of NARFE members
- Surviving spouses of eligible annuitants

PROSPECTING/RECRUITMENT MATERIALS

The F-135, current *narfe* magazine and M2s (Prospect/New Member Contact Information card), are used wherever possible as key recruiting and prospecting tools. Membership prospectors/recruiters are encouraged to limit event materials to these items for the sake of efficiency and marketing power.

A sample “elevator speech,” which is available online, is sent with each prospector/recruiter request for materials. It is available online and attached here as well.

Keeping the exchange focused is critical. Limiting materials and having a well-rehearsed “elevator speech” will

keep the conversation focused and provide manageable, digestible information for the prospect.

PROSPECTING/RECRUITING TECHNIQUES

Opportunities for prospecting/recruitment are everywhere and occur at unexpected times. In theory, there is no scarcity of prospects, since fewer than one out of four federal employees ever join NARFE. The number is smaller for survivor annuitants and is smaller yet for spouses.

When approaching a prospect, always acknowledge his or her point of view. The prospect may not share your experience in federal service nor see his or her impending or current retirement the way you do. During face-to-face meetings, listen to the prospect’s needs and relate those needs to solutions provided by NARFE benefits. Familiarize yourself with the “hot button” issues for federal government workers and retirees (though be aware of generational differences). The Association’s *narfe* magazine is an excellent source of information about these issues.

The needs and expectations of today’s retirees – whose ages range from mid-50s to early 60s – are different from the generation of their parents or, for that matter, many NARFE members. Active employees who are joining NARFE may have different goals. It has been pointed out that baby boomers are not joiners and are often guided by self-interest when making decisions on commitment. That’s why conveying the right benefits messages is so important.



F-135

 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)

M-2 Card

The key to recruitment is to “Just do it!” as NIKE’s advertisements say. Prospecting/recruiting requires commitment. It involves contacting people and telling them about NARFE. The specific techniques will vary, depending on the availability and use of the resources and the personalities of the people involved.

WHO AND HOW TO PROSPECT/RECRUIT

Successful recruitment depends upon continually finding new sources of eligible members. Also important is making federal employees aware of NARFE and the important role NARFE can play in their lives. Dispell the myth that NARFE is just for *retired* federal employees. The best time to join for most is *before* retirement.

WHO IS A PROSPECT?

Prospective members are civilian employees or retirees eligible to receive a federal annuity from the federal and the District of Columbia governments. (Note: D.C. employees were covered by a federal retirement plan prior to 1987.) Eligible prospects include:

- Federal retirees and applicable District of Columbia employees;
- Active federal employees, including congressional staff;
- Former federal employees, including individuals on disability;
- Spouses and former spouses of NARFE members; and
- Surviving spouses of eligible annuitants.

The common denominator is federal service and eligibility for a federal annuity. Military retirees are ineligible. Article I of the NARFE Bylaws is very clear on eligibility requirements.

SUGGESTED SOURCES FOR PROSPECTING/RECRUITING

Federal Agencies

Obtaining entrance into federal agencies can sometimes be difficult. Cultivating relationships with key agency personnel, however, is a proven path to success. It may take several attempts before you speak to the right person – such as a facility manager – who can grant permission for entry into the federal building. Once this is accomplished, you must be prepared and know exactly what you are going to do once entry is granted. For example, are you going to post an announcement about a chapter meeting or how to obtain information about NARFE membership? Are you going to conduct a lunch and learn for staff? Will you attend a health fair or other event that is being hosted by the agency?

NARFE members often personally know many colleagues – both current and retired – from their former agency and have remained in contact with them into retirement. Ask them (especially new members) to identify co-workers, former associates and acquaintances from social, religious, civic, fraternal and professional organizations who are or were federal employees. Circulate these lists at chapter/federation board or area/district meetings.

Pre-retirement Seminars (PRS) and Webinars

Pre-retirement seminars/webinars are also an important source of prospective members. Employees within three to five years or more of retirement usually attend. More often, seminars/webinars are used to create awareness of NARFE's role in retirement planning. Many federal employees join after they retire as a result of attending a seminar/webinar.

Sometimes, PRS leaders are able to collect the names of attendees by offering a complimentary copy of *narfe* magazine and/or the F-135. The key points to emphasize during a seminar/webinar are NARFE's mission, the Association's legislative accomplishments, as well as current legislation issues affecting benefits, and how NARFE continuously looks out for the interests of the federal community.

Event Opportunities

Events offer excellent opportunities to collect names, addresses, email addresses and phone numbers of nonmembers in attendance. These events can be general meetings or special events, such as state and county fairs, festivals, civic events, etc. You should always have the M2, Prospect Information cards on hand, and prospective members should be asked to share their contact information. (Reminder: Recruiters should keep a copy and send cards or a copy to HQ.) Never miss an opportunity to obtain contact information from a prospective member!

Local Newspapers and Other Publications

In many areas, the local newspaper or community publication are great tools to inform your local federal community about upcoming meetings. Always include the name and telephone number of a contact person. List meeting date, location, guest speaker and the subject of the presentation. If there is a cost associated with the lunch, state that as well. Chapter websites should include up-to-date information about your chapter or how to become a member of NARFE. Event notices are usually free, but you may want to consider placing paid advertising – such as newspaper ads, radio or TV spots – if funds are available.

Community Bulletin Boards

Post NARFE information in public libraries, retirement communities, apartment buildings, grocery stores, senior centers, chambers of commerce and hospitals. Many of these are also good places to leave copies of *narfe* magazine and/or the F-135 membership brochure.

Work the OAM and/or M-112

The OAM is a great tool for tracking membership within your chapter or federation. The M-112 can also be used; but while this particular report only provides a snapshot in time, the OAM provides the most up-to-date, real-time data. Maintain lists of nonrenewing members and their spouses as well as national-only members and spouses. Be careful how you use this list. There will be non-renewing members who are, in fact, "unreported." Please exercise tact when contacting former members.

Tracking Prospects

Though some may join immediately, not everyone will do so on the first try. All prospects – once entered into the NARFE database – will also become part of an email “cultivation effort” to engage and encourage them to join NARFE. Prospects are also a huge part of NARFE’s direct mail campaigns. It is important that chapters and federations keep good records on each prospect to ensure that he or she receives the local information and is encouraged to join.

The Recruiting Message in Words – Awareness

Regardless of technique, the same basic interchange occurs when recruiting. Identify your prospect’s needs and satisfy those needs with specific NARFE benefits. Recruiters are, of necessity, salespeople. The “elevator speech” can be extremely useful in keeping the exchange focused. The F-135 is the primary information tool to use.

Be prepared to promote benefits of membership, not just features. *narfe* magazine includes valuable information about benefits and retirement issues that affect the entire federal community, not just NARFE members. While prospects may be interested in several different benefits of Association membership, they may be swayed to join based on how well those benefits serve their interests. Actually, they may only identify with one issue, but that one issue may be all it takes. Most likely it will be a pocketbook issue that hits close to home. There are several ways to reach prospective members:

Face-to-Face Conversation

Direct “selling” requires a recruiter who is willing to talk and listen and an interested prospective member willing to listen and talk. If possible, provide the prospect with a recent issue of *narfe* magazine and an F-135. Be yourself, and tell prospects why you joined the Association. Often, you can communicate essential information in a response to questions, such as: “What is NARFE doing about ...?” You will seem more knowledgeable if you review key talking points in advance. Your willingness to help prospective recruits and address their concerns goes a long way. Encourage members to:

- Talk about NARFE at every opportunity (doctors’ offices, grocery stores, church, etc.).
- Assist at pre-retirement seminars/webinars.
- Sponsor recruiting events and invite (nonmember) friends.
- Organize and participate in membership campaigns as an individual or a member of a team.

Suggested Prospect Tracking Techniques:

- Designate specific members to compile and update prospect lists from all known sources.
 - Record the name, address and telephone/mobile phone numbers of each prospect, and distribute it to the Membership Committee member who will contact the prospect. Annotate the record with appropriate comments.
 - Involve as many chapter members as you can in the recruiting process.
-

Direct Mail Campaigns

Marketing to prospects and new members by direct response advertising can be highly effective. Direct mail provides an opportunity for prospects to receive printed information about the advantages of NARFE membership. Coordinating a direct mail campaign with a chapter/federation event bolsters your recruitment efforts and provides an ideal opportunity to make contact with prospective members.

A mailing should include a signed cover letter and information on how to join (if corresponding with a prospect). If you are sending out a chapter mailing, include specifics on chapter meeting location, date and time. Include a return envelope (preferably one that is pre-addressed and stamped). Keep the message simple and to the point. Provide a contact name along with a telephone number and/or email address for the prospect should he or she have questions. If funds allow, include in your mailing:

- A recent issue of *narfe* magazine and/or F-135, NARFE Brochure

For direct mail solicitations on the chapter level, include:

- Information on the local chapter (in the form of a special brochure or flyer)
- Name of chapter contact and telephone number
- Reprints of newspaper articles about chapter activities
- The chapter newsletter
- An invitation to chapter events that are mentioned in the cover letter.

A special direct mail campaign should be planned and executed with the full support of the chapter/federation since it requires dedicated resources. For best results:

- Ensure that information (name, address, telephone number) contained on the prospect list is correct.
- Always follow up with a personal contact (either face-to-face or by telephone).
- Organize volunteers to address envelopes, affix postage, mail and follow up.
- Respond to any inquiry immediately.

Follow-Up from Pre-retirement Seminars /Webinars

Pre-retirement seminars and webinars present extremely effective branding opportunities. On most occasions, it is permissible to collect the names, email and mailing addresses of pre-retirement seminar (PRS) or webinars attendees. Take advantage! For many attendees, this will be the first time they become aware of NARFE. Be prepared to define the mission of NARFE and how the Association is their legislative voice and information resource.

- Forward all questions from attendees to the appropriate officer or member for response. (Send questions regarding pending legislation to the legislative officer; annuity questions to the service officer, etc.).
- Prepare a follow-up plan to engage PRS potential members.

Telephone Prospective Members

Use volunteers to phone prospects during specific times. The primary advantages to phoning potential members are speed and convenience, especially when following written or face-to-face contact. Telephone contact is usually not productive when used alone. However, it can increase the effectiveness of a recruitment campaign when combined with face-to-face or direct mail efforts. Practice this technique. Cold calling, no matter how innocent, may anger the prospect who can seek protection or may be on the “Do Not Call List.” Approach cold calling gingerly. Relate to the person you are calling. “Are you Joan Smith? Didn’t you work for USDA? Hi, I’m Helen Jones. I was with the Soil Conservation Service. I’m calling you on behalf of the National Active and Retired.... You might recall we sent you information about the Association and our work on your behalf.” Though this approach doesn’t work all the time, it establishes common ground and may make the respondent more receptive to your solicitation.

Key points to consider:

- Callers must be prepared to speak effectively about NARFE to people they do not know personally.
- Callers should be trained to anticipate an array of questions and respond pleasantly with appropriate information.
- This method is especially effective if prospects receive advance information to prepare them for the call.
- Telephone contact is an especially useful way to encourage participation at events since callers extend personal invitations to respondents.

Note: Prep time and practice is recommended before beginning a telemarketing campaign so that all callers are on the same page and well-versed on the legislative issues of day and other pertinent resources and information.

Communicating Via E-mail and Social Media

(See page 15)

SECTION TWO

TOGETHER WE CAN – ENGAGEMENT

Membership marketing goals and creating engagement tactics are usually set by officers and the membership chairperson. All should be fully shared with the entire membership. This reinforces the importance of membership strategies. It is the responsibility of each and every leader to make membership marketing a declared commitment and visible priority

✓ Use NARFE Meetings to Promote Membership

Promote membership marketing and engagement tactics during chapter and/or federation meetings or conventions.

At conventions and meetings, provide time to introduce new members and guests. Report the results of recruitment activities. Recognize new members, prospectors and recruiters of new members.

Discuss incentives to entice participation in membership marketing activities. No matter how large or small the attendance, devote some time during the meeting to membership. Continuously reinforce the impact and importance of membership marketing.

**Start at the beginning.
... Begin with a
membership plan.**

✓ Develop a Membership Marketing Plan / Strategy

Create an annual plan with defined goals. Review the plan every year, re-evaluate and change it as circumstances dictate. National produces an annual membership marketing strategic plan as do many federations. Chapter plans should complement both and be the focus of direct recruitment within a geographical area. Determine how much money can be spent in support of recruitment. Federations have “10 percent” funds that can be used for membership activities. Both federations (in some cases) and National have matching funds programs that can be used for recruitment.

A commitment to membership must be demonstrated by chapter and federation leaders, even those not directly responsible for membership.

✓ Set Aside Funds to Recognize Successful Recruiters and Prospectors

Recognition is a powerful stimulus to further recruiting and prospecting efforts. Think of appropriate gifts and awards as incentives as well as rewards.

✓ Use Newsletters to Promote Membership

Include a list of new members and prospects, successful recruiters and prospectors, and a list of new Life members, or members opting for dues withholding. If membership is on the rise, let members

know there is growth. Conversely, if there is a decline in membership, advise members that work is needed to reverse a downward trend.

✓ Display Membership Materials Prominently at Meetings/Events

Display recruitment/prospecting materials and encourage members to take F-135s with them. Print the F-135 application in newsletters. Point out that there are also three other ways prospects can join:

1. The *narfe* magazine includes a membership application;
2. The NARFE website includes an application; or
3. Call the Membership Recruitment Hotline at 800-627-3394.

Leadership Strategies

The more members involved in recruitment, the better the result.

Involve Members:

- Invite members to become involved in membership strategies. Do not expect people to call you.
- Create jobs, based on volunteers' skills and abilities.
- Include as many members as possible in decisionmaking and goal setting.
- Create a spirit of teamwork.
- Acknowledge all work done on behalf of NARFE.
- Be specific about assignments. The better a task is understood, the less work it will seem and the better chance it will be successful.

Motivate and Engage Members:

- Develop a plan of action for membership and share the plan.
- Communicate with and educate members regularly.
- Use every opportunity to say "thank you."
- Delegate responsibility, if appropriate.

Ensure the Job Is Completed as Planned:

- Distribute and review the membership plan with everyone involved.
- Report progress – both successes and failures.
- Ask for feedback; the opinions of others are important.
- Monitor and modify the plan as needed.
- Clearly communicate specific expectations at the start of the plan's implementation.

Set Goals

The following are suggested goals that are achievable. Each should be followed by statements describing how the goal will be accomplished. Sample goals may include:

- Increase the number of prospects and members recruited over last year.
- Increase the number of prospects and new members per month by a specific number.

TOGETHER WE CAN – ENGAGEMENT

- Increase the number of prospects and members joining through pre-retirement seminars or webinars by a certain number.
- Increase the number of members participating in all membership marketing activities by a certain number.
- Increase the number of prospects and members who are active federal employees by a certain number.
- Increase the number of NARFE spouse members by a certain number.
- Develop and conduct a certain number of prospective and new-member orientations.
- Increase the number of member renewals by a certain number.
- Increase the number of members who participate in the dues withholding program by a certain percentage.

Note: In determining the goals that include numbers and/or percentages, it is best to present a well-thought-out number in order to avoid setting yourself up for failure. It is better to exceed a goal than not meet a goal. For example: If you can – with some certainty – project that you will increase your membership by five people, then specify that. Don't declare that you will recruit 10 new members if reaching that goal in the given time frame is unrealistic.

Membership Chair

The membership chair is a leader who can help accomplish the goals. This is someone committed to success and who understands that membership marketing is, in fact, a survival skill. The membership chair's goals should include:

- Inviting members to assist in the work of the chapter and the Association.
- Assigning tasks to volunteer members, based on skills or interests.
- Getting as many members as possible involved in making decisions and setting goals.
- Creating a sense of unity throughout the chapter.
- Acknowledging the recruitment efforts of others.
- Communicating regularly with officers and members.
- Delegating responsibility.

TIPS FOR THE FIELD

- Stay informed and monitor local events that permit a display booth or perhaps an opportunity to speak about NARFE.
 - Order the prospecting and recruitment material from the National Office. (Allow a minimum of three weeks for delivery before the event.)
 - Have at least two well-informed members working at all times. You may need to rotate about every two to four hours.
 - Keep a sign-up sheet for visitors. Offer a one-year gift membership or other appropriate gift to encourage potential members to share contact information.
 - Send a note or write a letter to each prospective member thanking him/her for inquiring about joining NARFE or attending a meeting.
-

MEMBERSHIP CAMPAIGNS

Membership campaigns can be great opportunities for prospecting and recruiting. They do, however, require considerable planning, time and resources. Also, campaigns might be better organized at the federation level, since many chapters may not have the resources to devote to such efforts. Federations should, nonetheless, involve chapters that are willing to help.

Five Principles for an Effective Membership Campaign

Five basic principles useful in conducting successful membership campaigns can be adapted to the available resources and budget.

Plan

- Determine what type of campaign you will conduct.
- Define the scope of the campaign by establishing dates to initiate it; identify members who will participate; and determine the resources that are needed and available.
- Set specific goals, and discuss these with the members.
- Avoid schedule conflicts with other events.
- Prepare necessary prospecting/recruitment materials.

Organize

- List the action items to be accomplished and who will be responsible for them.
- Divide the work into manageable units. Keep the volunteer's personal schedule in mind when assigning tasks.
- Establish and implement simple, easily understood procedures for all volunteers.
- Determine contest rules and types of incentives for prospective and new members, as well as recognition of volunteers.

Staff

- Ensure all involved are prepared and ready to take on their assigned tasks.
- Make sure that prospectors and recruiters are enthusiastic and knowledgeable about NARFE.

Direct

- Lead, motivate and modify the campaign to keep the momentum going.
- Communicate regularly with all involved. Short-term campaigns require frequent (weekly) communication, while year-long drives can be updated monthly.

Evaluate

- Measure results.
- Review the original plan and what actually occurred.
- Encourage feedback to assure positive results for the next campaign.
- Recognize everyone who contributed to the effort.

Suggestions and Ideas for Membership Campaigns

Recognition for Prospecting and Recruiting Efforts

Member recognition is critical for success. Just a simple “thank you” goes a long way in recognizing and encouraging member participation. Every member’s contribution should be acknowledged.

Listed below are suggested ways to acknowledge the efforts of volunteers:

- Participants are recognized by the chapter/federation president and – when appropriate – by the entire membership for each new member recruited.
- New members recruited during the campaign are introduced by their recruiter, or at least their names are shared at meetings.
- Information is attractively displayed at each chapter/federation meeting during the campaign. Include the names of those involved, areas of responsibility and accomplishments to date.
- Top prospectors and recruiters are recognized by the chapter/federation president during meetings/events and at the federation’s annual convention.
- Results are published in the chapter/federation newsletter with names of recruiters and members recruited.
- A “thank you” letter from the chapter/federation president is sent to each recruiter.
- Recruiters receive a pin, plaque or certificate based on the number of members recruited.
- Those involved in the campaign wear a special ribbon or button to events during the campaign. Recruiters should wear special name badges at chapter/federation events, especially those held during a campaign.
- A “Prospector or Recruiter of the Month” should be highlighted in the chapter/federation newsletter.

Plan the Action

A successful membership campaign depends on advance planning. The following suggestions may help plan the next one.

Objectives

Definition:

A statement of what you plan to accomplish and how achieving it will support the overall mission of NARFE should be included.

Criteria:

- Statements should be specific, with end results clearly and easily understood.
- Goals should be challenging, yet attainable.
- Membership campaigns should support the chapter/federation missions.
- Campaigns should be organized to achieve measurable results.

**Success depends on
advance planning.
The more detailed
the planning, the bet-
ter the chance.**

Examples:

- Increase membership by 20 percent.
- Improve the renewal rate to 98 percent.
- Expand general membership participation by 25 percent.
- Conduct six new-member orientations annually.
- Bring dues-withholding members to 10 percent of total membership.

Once a program is begun, track the results. Be objective.

Methods to Achieve the Objectives**Criteria:**

- Specific actions and tactics are matched to each objective.
- Each tactic is clearly defined and understood by all participants.
- Strategies are prioritized and contain timelines for execution and completion of tactics.

Examples:

- Develop a prospecting/recruitment presentation session for members interested in joining the membership marketing effort.
- Identify methods and procedures for communicating the benefits of NARFE to members and nonmembers.
- Distribute membership materials at meetings and encourage individual prospecting and recruiting.

Use Incentives in Prospecting/Recruitment Campaigns

Incentives and recognition can be effective ways of inspiring members to prospect/recruit.

SECTION THREE

RETENTION – RENEWALS AND REINSTATEMENTS

An Important Part of Membership Marketing

NARFE’s retention rate (renewals plus reinstates) is very high within the association world. At this publishing date, the retention rate approximates 92 percent. Only about 15 percent of associations experience this high level of retention. It doesn’t mean, however, that we shouldn’t do everything possible to keep NARFE’s members’ interest high through engagement and branded resources. An email newsletter series titled “eConnect,” which is sent to first-year members, is one example of such an initiative.

Ensuring Member Retention

After successfully acquiring new members, associations must work hard to retain their membership. Having a members’ engagement program in place will help increase renewal rates, and – in some cases – assist in reinstating lapsed members.

Retention Begins on Day One

Members join NARFE for various reasons. Members who join prior to retirement do so for reasons that may be different from those members who join after retirement. Once recruited, that member should be cultivated and nurtured. 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.
- Contact members who do not renew to find out why they did not renew and invite their participation, or encourage them to attend a meeting or convention.
- Accommodate current federal employees and their schedules.

Welcome New Members

Encourage new members to fill out a personal/professional information profile of their skills, abilities and preferences. Ask them what they are looking for as NARFE members. Let them know these completed forms will be used to encourage their involvement in Association activities.

Recruitment Impacts Retention

Association studies reveal that when new members are engaged in the life of the organization within the first months of joining, they are more likely to stay members. Furthermore, it is a common mistake for associations to “assume” existing members also know about the benefits. So make sure that the benefits are communicated at all levels. Also include spouses by inviting them to become active since their involvement can improve retention.

Promote Membership Marketing, Which Includes Retention

Don’t forget to recognize and thank volunteers, especially those who work to keep members engaged. Too often, the rewards of membership fall to the more visible recruiters. There are many

parts to a successful membership marketing plan. Each area deserves a form of recognition.

Keep Members Well-Informed

An association cannot expect to be truly successful without communicating with its members. Knowledge about NARFE’s legislative agenda, benefits and services helps you to communicate with confidence and authority.

Suggested Courses of Action

- Call members who do not renew, and encourage them to rejoin.
- Select a slogan to promote retention, and use it throughout year.
- Acknowledge renewing members by listing their names in newsletters.
- Celebrate “Distinguished Members” at chapter/federation events.

Thank Renewing Members for Their Continued Support

Recognition for renewing is positive reinforcement. It motivates and encourages members to remain members. Since recruitment is geared to inform members of NARFE benefits, renewal time is a great opportunity to hit these key points and emphasize new activity or benefits to members.

Social Media*

Social Media has become an increasingly used marketing tool across many industries – associations included.

Facebook, Twitter and LinkedIn (which provide open public access) are the three most common social media sites used by associations for the past four years or more. Individual membership associations are significantly more likely than trade associations to use Facebook (89 percent vs. 79 percent).

Trend data show a steady increase in the percentage of associations that use an association blog and a members-only LinkedIn site.

Seeing as Facebook, Twitter and a public LinkedIn site are the most commonly used social media platforms for associations, it is no surprise that they are most often used for almost all forms of member engagement.

Twitter tends to be used more than Facebook when promoting discussion or specific sessions at events. YouTube is used slightly more than Twitter when providing how-to information, presumably because it incorporates a video demonstration (although Twitter can include a link to the YouTube feed).

Facebook is used more often than Twitter for soliciting new members and promoting membership in the organization, but the public LinkedIn site is best used for harvesting the contact information for recruitment efforts.

**Provided by Marketing General Incorporated, Benchmarking Report 2013.*

**Do you really know
your members?**

**What is it they want
from your chapter?**

**Are you giving them
what they want?**

SECTION FOUR

APPENDICES

Useful Information for Membership Marketing (awareness, prospecting/recruitment, engagement, renewal and reinstatement)

NARFE's Mission and Vision Statement

Mission: "To support legislation beneficial to current and potential federal annuitants and to oppose legislation contrary to their interests.

To promote the general welfare of current and potential federal annuitants by advising them with respect to their rights under retirement laws and regulations.

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

Vision: "To ensure that ...

- NARFE is recognized as the Association devoted exclusively to serving and protecting the earned entitlements, rights and benefits of all federal retirees, employees and survivors.
- Great work is done to help preserve those rights and benefits.
- Members receive the highest-quality services and products.
- All members are left with the knowledge and understanding that their needs and wants are being taken to the highest levels of government for resolution."

NARFE is a nonprofit membership organization committed to promoting and protecting the individual and interests of people who share a vested interest in the federal retirement system.

Who Is Eligible to Join?

Membership is open to civilians who are or will be eligible to receive an annuity or survivor annuity from the federal retirement programs of any agency of the United States government and of the District of Columbia*, including:

- Retirees;
- Active employees;
- Spouses and surviving spouses of those eligible to join NARFE;
- Former employees; or
- A former spouse who is legally entitled to a federal survivor annuity.

*Prior to October 1, 1987

Typical Questions asked by Prospective Members

- What is NARFE? *The National Active and Retired Federal Employees Association is the only organization solely dedicated to protecting and preserving the pay and benefits of all federal workers and retirees.*
- I am only 50 but worked for the government for 20 years. Can I join?
- I worked for the government, never retired, but quit. Can I still join?

- My wife/husband is retired from government service. Can I join?
- I belong to AARP. Can I join?
- I am currently working for the government. Can I join?
- I'm only 40 but retired from the government on disability. Can I join?
- My husband/wife served in the government prior to his/her death. Can I join?
- I'm on Social Security and my wife/husband is a NARFE member. Can I join?
- I am currently employed in private industry but previously worked for the government. Can I join?
- I retired from an agency of the federal government that is not subject to the civil service retirement system. Can I join?

The answer to all those questions is YES! But be prepared for others, such as: "Why should I join NARFE?"; or "If I join AARP, why should I join NARFE?" The more you know, the more likely your prospect is to join.

What Are Some Benefits of Membership? (Earned-Benefit Protection. Vital Information. Answers to Critical Questions)

- Powerful representation and advocacy before Congress, the Office of Personnel Management and the White House.
 - Award-winning *narfe* magazine, the prime source of information and guidance on critical legislation and benefit issues.
 - Members-only section of the NARFE website with up-to-the-minute information and a Legislative Action Center.
 - Access to a team of Federal Benefits Service specialists for answers to complex questions.
 - Legislative e-Alerts on congressional business directly impacting the federal community.
 - Scholarship and disaster-relief grant qualifications.
 - Members-only eligibility for special discounts on products and services.
-

Answers to Typical Question by Prospective Members

My spouse died recently, and I'm confused about my benefits. Can NARFE help me? My health insurance was fouled up after I retired. Does NARFE provide any aid?

Yes. NARFE's Federal Benefits Service Department staff can assist you with preparing the proper paperwork and contacting agencies in Washington, DC, or elsewhere within the federal retirement system. Additionally, local service officers and service centers are also available in some federations and chapters.

I'm an AARP member. What advantages does NARFE offer over AARP? Why should I join NARFE instead of AARP?

Why not take advantage of both? NARFE is the only organization, however, that is devoted solely to the special concerns of federal retirees. You can count on NARFE to protect your annuity income and health benefits and keep you abreast of legislative activity. AARP, the leading "seniors" organization in the United States, serves the varied interests of many people over age 50. Its members are primarily from the private sector, and their needs and concerns may be different from those of federal employees and retirees. The majority of NARFE members are AARP members.

How much does membership cost?

Membership with NARFE is inexpensive and includes both national and chapter dues. New first-year members pay a set membership fee. Renewing members pay annual membership dues (National) plus chapter dues, which are determined independently by local chapters. The electronic chapter, eNARFE – Chapter 2363 – does not charge chapter dues.

What are the Membership Payment Options?

Dues Withholding

- Convenient and economical, this payment option (a 15 percent discount) authorizes the Office of Personnel Management (OPM) to withhold the annual dues (National plus chapter dues) from a member's monthly federal annuity. Dues cannot be deducted from paychecks of current federal employees.
- A first-year fee and/or renewing national and chapter dues are withheld from the monthly annuity check at the rate of one-twelfth of the combined dues each month.
- Dues for spouses may also be withheld from monthly annuities.
- New members or annually renewing members must complete Dues Withholding applications DW-2A or DW-2 with their Social Security and CSA or CSF numbers.
- Applicants send the completed Dues Withholding applications to NARFE. No money is sent.
- Applications require 60 to 90 days for processing.

Because members on dues withholding receive a discounted dues rate, NARFE has stressed dues withholding as an excellent renewal tool. Current employees may not participate in dues withholding, however. NARFE has a dues withholding agreement with OPM only. The Association cannot enter into dues withholding arrangements with retired employees who participate in other programs, such as State, CIA, etc.

National Life Membership

- National dues are paid for life, thus avoiding any future dues increases. A sliding fee scale, determined by age, is published in *narfe* magazine.
- Members can remit a single payment or four quarterly installments in the first year.
- Chapter dues are not part of National Life membership and must be paid separately.
- Chapter dues are billed annually or can be paid in advance for up to five years. Chapters may also choose their own chapter life membership dues plan or can exempt national life members from paying chapter dues.
- Members or prospective members must complete a National Life Membership application (Form F-53). Allow four weeks for processing.

Annually Renewing Members' Dues Payments

- Membership payments (check, money order or credit card information) should be sent with completed applications. Members may also renew online or by calling NARFE's toll-free number at 1-800-456-8410.

- Following the first year of membership, members receive a renewal notice for chapter and National dues. Only members who joined NARFE prior to January 1, 1989, and opted for “National Only” membership and remained National Only members are exempt from chapter membership. These members are referred to as “LSAs,” which means they are in the chapter’s ZIP code area and are included in its total membership count.
- Cash payments are not accepted. Only checks, money orders or credit card payments are accepted. Dues may be renewed by credit card online at www.narfe.org, through the mail, or by calling Member Records at 800-456-8410.

NOTE: Dues payments and gifts or contributions to NARFE are not tax-deductible as charitable contributions.

Recruiter Do’s and Don’ts

The Complete Prospector/Recruiter ...

- Always carries several F-135s (membership brochures);
- Tells others how he/she personally benefits from NARFE membership
- Relaxes and wears a friendly face;
- Listens carefully to learn about the prospect’s interests and concerns;
- Watches for nonverbal communication (posture/body language, eye contact, etc.);
- Encourages questions and is prepared to answer predictable ones;
- Counters negative comments with positive ones;
- Invites those interested to local chapter meetings, federation conventions and/or other NARFE-related events; and
- Engages new members in the business of NARFE.

A Successful Prospector/Recruiter Does Not ...

- Give up after one try;
- Disagree with a prospect. Rather he/she concedes a legitimate point or objection and offers additional information that may alter the prospect’s perspective;
- Presume anything without asking questions;
- Get offended if a prospect declines an invitation to join. Rejection is not personal; or
- Argue with, frown at, complain about or be discouraged by anyone who does not join. Keep smiling and recruiting!

NARFE’s National Office will ship the prospecting/recruitment materials (*narfe* magazines, F-135s and M2 cards) free of charge. Supply form F-18 lists the appropriate materials available or call Recruitment and Retention toll-free at 800-627-3394.

Recruitment and Retention Aids

NARFE LetterBook

Contains sample letters for many different occasions. These letters are found online on NARFE's website. Log in, click on "Officer Resources," then click on "Tips, Tools and Templates." Under "Communication Tools" click on "Sample Chapter/Federation Member Communications."

Tabletop Displays

The National Office has lighted table-top and table-side displays for use by members when representing NARFE at health fairs, community events or federal agencies. The displays promote NARFE and will attract prospective members to your exhibit space. You may borrow one by calling Recruitment and Retention at 800-627-3394.

Outbound shipping charges are paid by National; inbound or pass-along shipments are paid by the chapter or federation. Booths must be returned promptly or sent on to another destination per instructions from National. Federations/chapters that frequently exhibit at fairs and agencies are encouraged to purchase their own booths. New tabletop displays cost between \$1,100 and \$1,400; used displays are priced around \$600, when available. Retractable banner displays, often more convenient for NARFE members to transport and use, can be purchased through the Recruitment and Retention Section.

"Logo Plus" Computer Discs

The NARFE logo and seal are available electronically or on CD to newsletter editors using PC or Macintosh operating systems. They also are available on the NARFE website. Go to www.narfe.org, log in, click on "Officer Resources," then "Tips, Tools & Templates."



**National Active and Retired
Federal Employees Association**

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