



NARFE Information Technology Advisory Committee (NIAC) Final Report

July 20, 2011



NIAC Committee Members

- **Charlie Pratt, Chairman (BS, MS Civil Engineering)**
 - Developed and Manages NC Federation Web Site
 - Proficient in programming languages
- **Pat Dempsey (BA, MS Computer Science)**
 - IT System Manager for major system (400 work years) at SSA
 - Computer programming and data base design
- **Bob Drake (BS, MS Operations Research)**
 - Chapter Officer and Membership Chair in Large & Small Chapter
 - CIO of Two DoD Major Components
- **Bill Leatham (BA Hist/Acctg, MIS)**
 - Senior Financial & Software Management at FDIC
 - Up to date on current IT systems and architecture



Study Objectives

- **Articulate a comprehensive 21st Century strategic vision for information technology for the Association**
- **Review all information technology policies, procedures and organizational structure and recommend revisions, where appropriate**
- **Analyze the Associations major operating systems and recommend upgrades, where applicable**
- **Evaluate all principal data entry centers in terms of effectiveness and efficiency and recommend necessary operational modifications**
- **Review communications processes and procedures between headquarters, federations, and chapters and recommend a more holistic and integrated strategy.**



NIAC Strategic Vision

- **Retention**
- **Recruiting**
- **Legislative Agenda**
 - Improve internal and external communications
 - Clear and easy access to Legislative web site initiatives
- **Near Term Affordability**
 - Funds are scarce
 - Employ low cost collaboration tools to save travel funds
- **Long term solution will require substantial funding**
 - Need to increase membership revenue
 - Will save on staff costs through reduced administration
 - Will contribute significantly to the NARFE mission



Study Methodology Timeline

- **January 17-18, 2011, NIAC meets in Alexandria, VA with NARFE HQ Officers and Staff**
- **NIAC starts writing individual sections for the Draft Report and meets weekly using GoToMeeting on-line**
- **March 4, 2011, Pat (MD) and Bob (VA) brief the NEB at their meeting in Rosslyn, VA on NIAC's preliminary findings and solutions.**
- **NIAC continues weekly meetings**
- **March 31, 2011, NIAC submitted their Draft Report to NARFE Vice President, Paul Carew.**
- **NIAC continues weekly meetings to refine and update the Draft Report**
- **July 1, NIAC submitted its Final Report to the NARFE Vice President.**



NIAC Scope

- **Information Technology Architecture including hardware, software, communications, security, and system management**
- **Membership System Processing to include information flows from inception to dissemination to NARFE HQ, Region VPs, Federations, Chapters, and Individual Members and back**
- **Financial System Processing to include information flows, software, and management**
- **NARFE Internet Architecture including infrastructure, hardware and software support, applications, security, and electronic mail**
- **Systems Integration and Implementation**



IT Architecture Current

- **Hardware/Software**
 - **Primarily MICROSOFT (MS) based**
 - **Workstations – MS Windows XP Operating System with MS Office software**
 - **Servers - MS Windows Server Operating Systems**
 - **MS SQL SERVER as a local database**
 - **ORACLE Database in an offsite location (ISI)**
 - **ADOBE software for Web Design**
- **Points of Interest**
 - **Current configuration meets current functionality**
 - **Workstations need to be upgraded**
 - **Servers will need to be upgraded in the near future**



IT Architecture Near Term

- **Create a local MS SQL Server Database for web access of membership data**
 - Online reports
 - Updating Officer information
 - Updating membership information
 - New server needed
 - This data will be redundant to the ORACLE Database
- **Minimal changes to other areas for the near term**
- **Establish an IT Configuration Management Board to manage changes**
 - Track change requests
 - Guide new SQL Server Database development
 - Oversee changes to Web page
 - Consider new authentication scheme
 - Move from personal visits to a cheaper online meeting environment



Organization Communications Current

- **Chapter Roster F-7**
 - Database needs distinct codes for 1st and 2nd VPs to support chapter legislative efforts
 - Unnecessary scrolling for “No Change”
 - Latency too long – needs instant updating and display
 - Meeting place is in data base but not displayed
- **Federation Roster F-7A - as above plus:**
 - M-111A requires user to find code then contact
 - Need Retention, Recruiting, and Dues Withholding Chairs
 - Unrelated bad records in M-111A
- **Contacting membership to support Legislative Agenda**
 - 20% of membership have supplied e-mail addresses
 - Many telephone numbers are outdated
 - Many members have neither telephone nor e-mail information



Organization Communications F-7/F-7A Near Term

- **Chapter Roster F-7**
 - F-7 Have a “Submit” button that updates the F-7 and displays current status – no latency
 - Redesign form to have two “radio buttons,” Change and Vacant
 - If no changes needed, Advise submitter to page down to bottom and click “No Changes”
 - Add codes for 2nd VP, and others that generally support large chapters
- **Federation Roster F-7A**
 - Changes as in F-7 plus:
 - Redesign the M-111A to show organization hierarchy thus avoiding the need to look up the code first and then find the contact point
 - Provide a means to change Areas or Districts that enables Federation to manage AVPs/DVPs
 - Coordinate proposed changes with Configuration Management Board



Organization Communications Membership Contact Near Term

- **E-Mail Addresses**
 - Increase publicity to explain to members that rapid response is necessary for the FY 2012 Federal Budget initiatives
 - Update your information on-line ASAP or
 - Contact your Chapter Membership Chairperson
 - Federations guide chapters on
 - *CALLING* members to get their e-mail addresses – most effective method
- **Telephone Numbers**
 - Increase publicity to explain that current telephone numbers are needed for those who do not have e-mail
 - Chapters need to use address/telephone lookup sources on the Internet to get missing telephone numbers



Membership Processing Current

- **Region, Federation, and AVP/DVP M series reports need significant manual intervention to be useful**
- **Chapters**
 - **Find the paper and automated monthly M-112 Activity Report so difficult to use that retention suffers**
 - **There are nine classifications of “New Members”**
 - **Current dues expiration dates appear on the A-220 Accounting Report and not the M-112 making dropped member calls problematic and embarrassing**
 - **The semi-annual M-114 Membership Roster report is not current unless updated with paper M-112 data for the next 5 months**
 - **The quarterly M-114 is on-line and has less latency, but the majority of the chapters are not on-line**



Membership Processing Current M-112

Chapter Activity Report (M-112)

NEW MEMBERS:
Shows new members recruited by your chapter and the national office. The Recruited By (RB) column indicates either recruitment by the national office (N) or by the chapter (C).

MEMBER INFORMATION

- Eight Digit Identification Number
- Name
- Address, City, State & Zip
- Expiration Date or Dues Withholding Start Date
- Home Chapter Number
- National & Chapter Member or National Only (LSA) Membership
- Dues Category (see category key at bottom of Activity Report)
- Member Recruitment Code (applicable to new members only)
- Phone Number

MEMBERS TRANSFERRED OUT OF CHAPTER:
Shows members who have transferred out of your chapter into another chapter and the chapter to which they transferred.

REINSTATEMENTS:
Shows persons whose membership has been renewed after being dropped.

MEMBERS TRANSFERRED FROM ANOTHER CHAPTER OR LOGISTIC SUPPORT AREA (LSA): Shows members who have transferred into your chapter and the chapter from which the member transferred.

MEMBERS SENT A SECOND DUES NOTICE: Shows members sent second dues renewal notices.

DECEASED MEMBERS WITH TRANSFER OF MEMBERSHIP TO SPOUSE: Shows deceased members and the transfer of membership to the surviving spouse.

DROPPED FOR NON-RENEWAL: Shows members dropped for non-renewal of dues.

MEMBER PASSED AWAY: Shows deceased members with no membership transfer.

NATIONAL LIFE MEMBERS: Shows Life members (restored) who have paid chapter dues.

NATIONAL LIFE MEMBERS: Shows Life members suspended for non-payment of chapter dues.

PAYMENT STATUS CHANGE: Shows other membership activity such as members transferring from one dues paying status to another dues paying status.

NATIONAL ACTIVE AND RETIRED FEDERAL EMPLOYEES ASSOCIATION
MONTHLY CHAPTER ACTIVITY REPORT

M112 REPORT STATE: AL CHAPTER: 1899 RUSSELL COUNTY REPORTING PERIOD FROM 11/01/2007 TO 11/30/2007

MEMBER ID	NAME	ADDRESS	CITY	ST	ZIP
10638172	BARBAREE, LOUIE P	544 GA HIGHWAY 219	FORTSON	GA	31808
10740906	JOHNSON, MS BENWIE B	66 SANDPIT RD	HURTSBORO	AL	36860
10740907	JOHNSON, MR JOSEPH	66 SANDPIT RD	HURTSBORO	AL	36860
10166684	ENNIS, MR JAMES A	70 LEE RD 399	SMITHS	AL	36877
10166684	ENNIS, MR JAMES A	70 LEE RD 399	SMITHS	AL	36877
10740585	ROGERS, MR KENT E	PO BOX 343	HURTSBORO	AL	36860

MEMBERS SENT SECOND RENEWAL NOTICE

MEMBERS SENT SECOND RENEWAL NOTICE

NEW MEMBERSHIP INCENTIVE PROGRAM

0 TOTAL NEW MEMBER RECRUITED BY CHAPTER (C)
0 TOTAL NEW MEMBERS RECRUITED BY NATIONAL (N)
0 TOTAL MEMBERS TRANSFERRED OUT OF CHAPTER
0 TOTAL NEW MEMBERS TRANSFERRED FROM ANOTHER CHAPTER OR LSA
1 TOTAL REINSTATEMENTS
0 TOTAL NATIONAL LIFE MEMBERS (RESTORED) PAID CHAP DUES
6 TOTAL MEMBERS SECOND SENT DUES NOTICE
0 TOTAL MEMBERS PASSED AWAY
0 TOTAL DECEASED MEMBERS TRANSFERRING MEMBERSHIP TO SPOUSE
4 TOTAL MEMBERS DROPPED FOR NON-RENEWAL
0 TOTAL NATIONAL LIFE MEMBERS (NON-VOTING), NON-PAYMENT CHAP DUES
0 TOTAL VOLUNTARY CANCELLATIONS
6 TOTAL PAYMENT STATUS CHANGES
0 TOTAL PROSPECTIVE MEMBERS
3 TOTAL MEMBERS WITH ADDRESS, PHONE OR EMAIL CHANGE
0 TOTAL CURRENT FEDERAL EMPLOYEES (1YR)
0 TOTAL CURRENT FEDERAL EMPLOYEES (2YR)
0 TOTAL CURRENT FEDERAL EMPLOYEES (3YR)
0 TOTAL FREE 6 MONTHS - MEMBER
0 TOTAL FREE 6 MONTHS - SPOUSE
0 TOTAL 1 YEAR SPECIAL
0 TOTAL 2 YEAR SPECIAL

VOLUNTARY CANCELLATIONS: Shows members who cancelled their memberships.

ONE OR TWO YEAR SPECIAL: Shows members who were included in the NARFE OFM mailings.

CURRENT FEDERAL EMPLOYEES (1, 2 & 3 YR): Shows a member is still current federal employee.



Membership Processing M-114 Near Term Solution

- **By establishing a new SQL server at National, the membership data can be sent from ISI (the contractor) several times per day to give the NARFE community an on-line on demand Membership Roster with the most current contact information and member status**
- **Regions, Federations, and DVPs/AVPs will have a Master Organization hierarchical table to sort Membership data in that order with sub-total counts at each break**
- **Chapters will be able to retrieve their membership data, member counts, e-mail addresses, mailing addresses, and telephone numbers on demand any time of day**
- **Simple easy-to-use menu structure will be employed**
- **M-114 processing will be distributed over time instead of major runs every quarter**



Membership Processing Near Term Regions & Federations

REGION 10
FEDERATION NC
AVP/DVP 05
CHAPTER 105

Member ID	Last Name	First Name	Street Address	City	State	Zip	Home Phone	Email
10649692	ALTHAUS	VICKI	16 E MASONIC VIE	ALEXANDRIA	VA	22301	7036830161	
10839305	ALTHEIM	STEPHEN						
10455355	ALVAREZ	HECTOR R						
10401804	AMASON	JIM T						
10265065	AMERY	ROBERT						
10177364	AMICO	FREDERIC						
10745666	AMIRI	SHAHLA						
10766938	ANDELMAN	DAVID						
10817532	ANDERSON	ELOIS L						
10602619	ANDERSON	JOAN A						

Chapter Total: 10

CHAPTER 156

Member ID	Last Name	First Name	Street Address	City	State	Zip	Home Phone	Email
10621840	ANDERSON	GARY J	6410 WILLOWOOD	ALEXANDRIA	VA	22310	7039719017	G.ANDERSON83@VERIZON
10706049	ANDERSON	J PHILIP	8904 TITLEIST TRL	LORTON	VA	22079	7039225531	PHILIP.ANDERSON@COX.
10810600	ANDERSON	LUMBERT	6118 ROXBURY AV	SPRINGFIELD	VA	22152		am53@cox.net
10810789	ANDRUSIAK	DANIEL	PO BOX 11272	BURKE	VA	22009	7032502998	
10302748	ANNEAR	R SPENCER	1118 N HOWARD S	ALEXANDRIA	VA	22304	7037519130	

NARFE Master Organization Table

Region:

Federation:

AVP/DVP:

Chapter:

Edit Another

Add Another

Delete Current

Exit

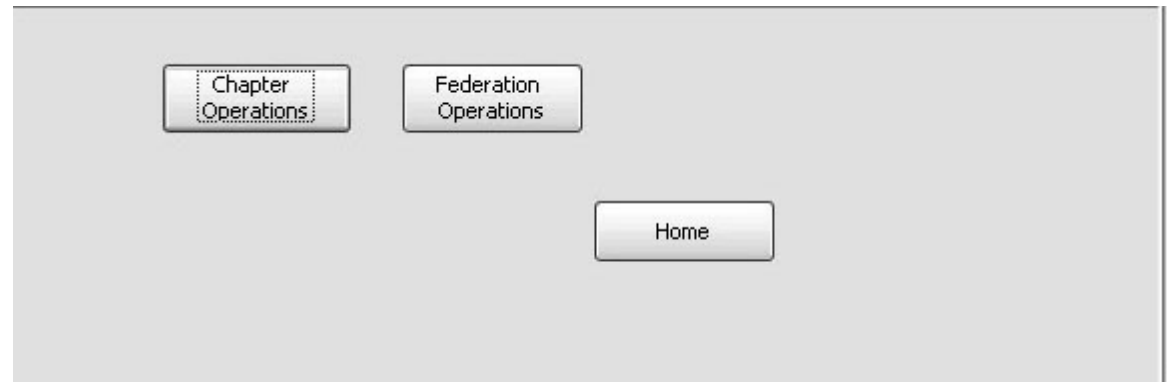


Membership Processing M-112 Near Term

- The M-112 Monthly Activity Report will need to be retained to enable consistent monthly performance measures across Regions, Federations, AVPs/DVPs, and Chapters and reconciliation with NARFE HQ accounting
- Regions, Federations, and AVPs/DVPs will get their information sorted accordingly and grouped to give meaningful comparisons across organizational sub-elements
- Chapters will be able to click on a screen and get
 - New Members (Welcome them)
 - Members Passed Away (This month and year-to-date)
 - Prospective Members (Recruit them)
 - Dropped Members (Call them for Retention)
- Keep the old M-112 on-line for those large chapters who still want to run parallel systems



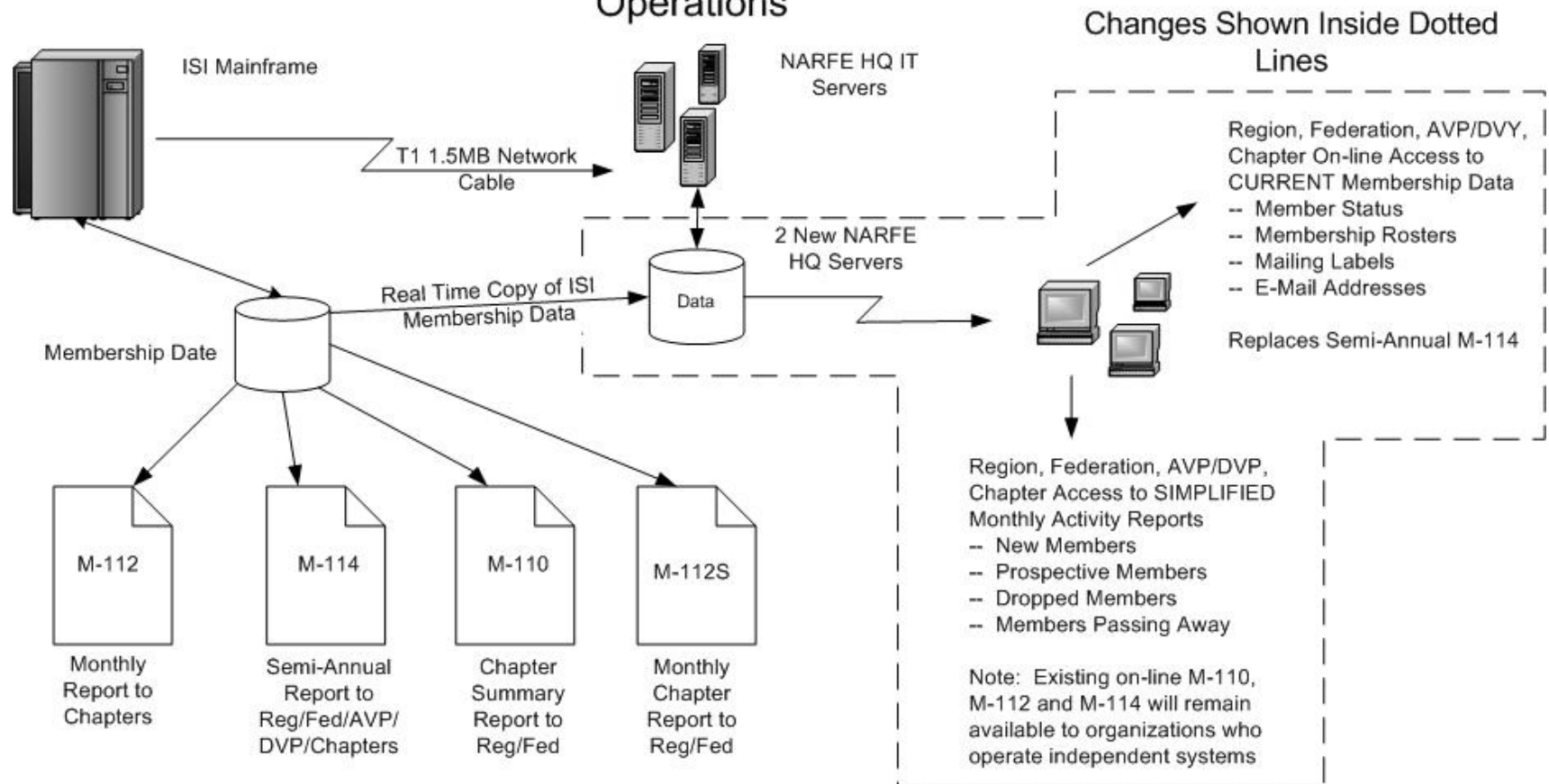
Membership Processing M-112 Near Term





Membership Processing System Design

NARFE Short Term Membership Database Operations





Financial Systems Processing

- **NARFE's financial operations are managed well using an older version of Microsoft Navision**
 - **Income is processed via a lockbox**
 - **Paper accounting reports provided by ISI**
 - **Membership dues are reconciled monthly**
- **No changes are recommended for the Near Term**
 - **System is operating well**
 - **Improvements would not impact recruiting, retention, nor legislative agenda**
- **For the Long Term, migration to a true Enterprise Resource Planning (ERP) system**
 - **Funds needed from significant membership increase**
 - **More efficient operations with less paper**
 - **Small reduction in accounting staff**



Internet Architecture Current

- **Current Architecture**
 - Sufficient to meet short term needs
 - Staff will need to be expanded or some tasks will need to be dropped
 - Technical capability exists within the staff



Internet Architecture

- **ISSUES**

- Need to increase use of social media and other outreach applications
- Need to recruit NARFE volunteers to conduct webinars, moderate blogs, etc.
- Too difficult to navigate to federation and chapter operations
- Authentication should be tied to the NARFE official who does the work
- Search engine needs to be specific to NARFE
- Establish volunteer Communications Advisory Working Group to augment NARFE HQ Staff



Summary Near Term

- **NARFE Officer Roster process (F7) needs to be fixed to enable effective NARFE-wide communications**
- **Need simplified and better organized monthly data (M-112) for regions, federations & chapters**
- **Need current on-line membership data (M-114)**
- **Implement NARFE Internet Usability Methodology**
- **Region, federation, and chapters need a maximum of three “clicks” to get to their data**
- **E-mail address coverage needs to be increased from 20%**
- **Establish a NARFE IT Configuration Management Board to represent all Regions (collaborative meetings – no travel)**
- **Use IT collaboration tools (HQ, Region, Federations) to reduce NARFE travel costs**



Summary Long Term

- **Membership needs to be increased substantially to support a Long Term solution**
- **Implement an Enterprise Resource Planning (ERP) System**
 - Integrates NARFE operations
 - Enables competitive contracts for IT support
 - Would involve Configuration Mgmt Board
- **Employ statistical and graphical performance measurement tools to facilitate for more effective management**
- **Redesign and streamline existing NARFE web site to provide more intuitive navigation for management, members, prospective members, and public**



Questions & Feedback