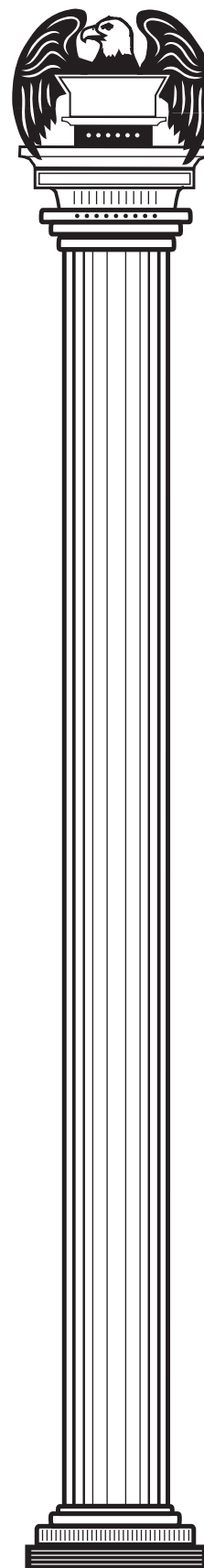
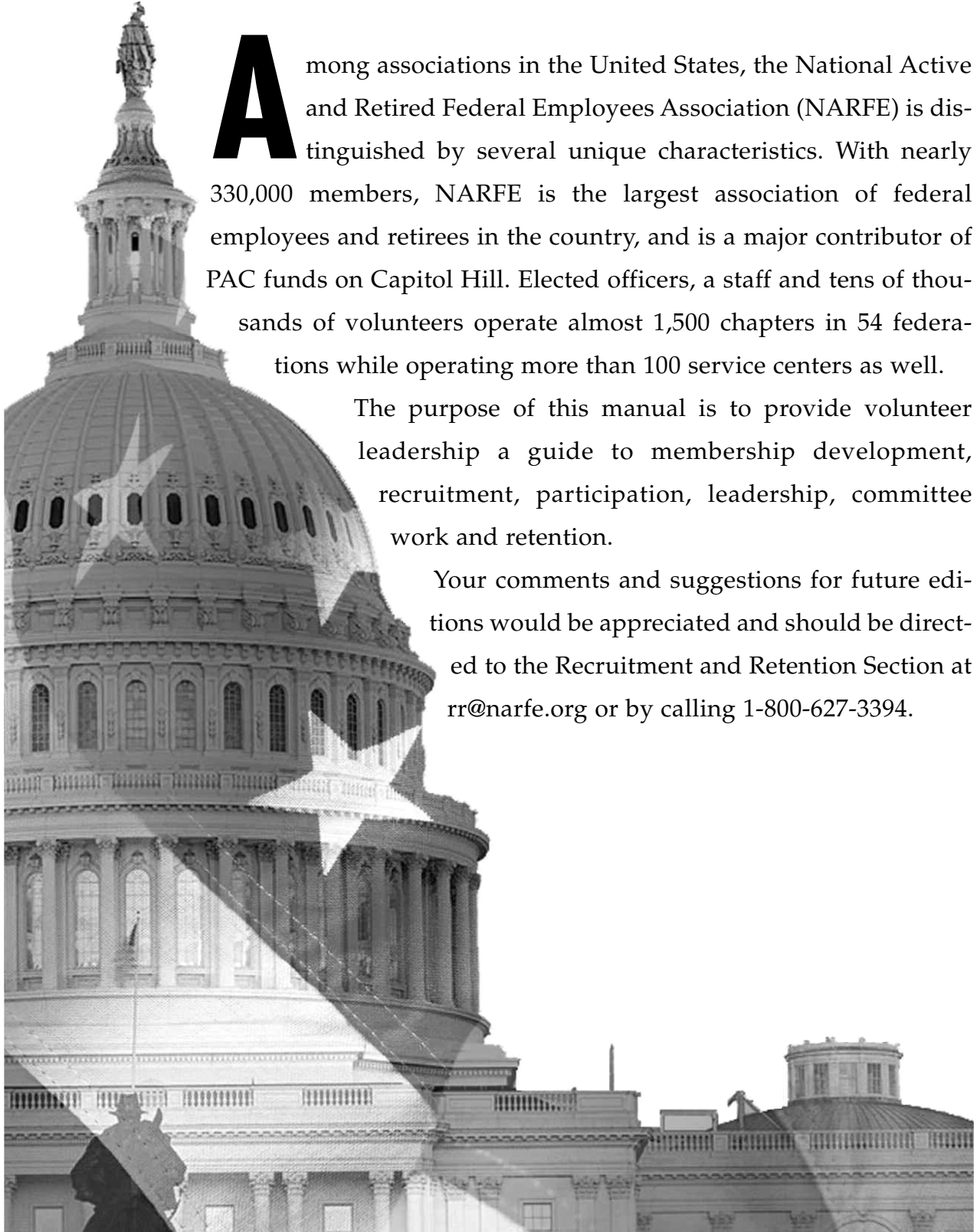


Membership Development Manual



Foreword



Among associations in the United States, the National Active and Retired Federal Employees Association (NARFE) is distinguished by several unique characteristics. With nearly 330,000 members, NARFE is the largest association of federal employees and retirees in the country, and is a major contributor of PAC funds on Capitol Hill. Elected officers, a staff and tens of thousands of volunteers operate almost 1,500 chapters in 54 federations while operating more than 100 service centers as well.

The purpose of this manual is to provide volunteer leadership a guide to membership development, recruitment, participation, leadership, committee work and retention.

Your comments and suggestions for future editions would be appreciated and should be directed to the Recruitment and Retention Section at rr@narfe.org or by calling 1-800-627-3394.

Section One



Who and How to Recruit

Potential NARFE Members and
Recruitment Techniques

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.

Who and How to Recruit?

Potential NARFE Members and Recruitment Techniques

The first steps in recruiting new members require identifying people eligible for membership, collecting information about them, and contacting them. Recruiting new members for NARFE is one of the two most important aspects of membership. The other is retention (see Section Three).

Successful recruitment depends upon continually finding new sources of eligible members. Identifying potential members may not be easy. Federal employees often are unaware of NARFE and the role NARFE can play in their lives. Many think NARFE is just for retired federal employees and don't realize

the best time to join is before they retire. Federal agencies will not provide recruiters with the names and home addresses of active employees. Retirees are even more difficult to identify.

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. (DC employees were covered by a federal retirement plan prior to 1987.)

- 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
- 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 of Prospects

Agency Visits

Members often know the names of current and former co-workers who may have remained in contact with their personnel offices. Leave literature with personnel officers or post meeting notices on bulletin boards where permitted. Agency alumni directories are another source of prospective names.

Membership Survey

Ask chapter members (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, board or district meetings.

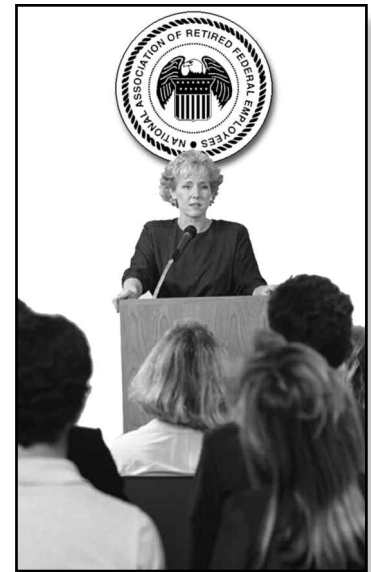
Pre-retirement Seminars (PRS)

Pre-retirement seminars are an important source of prospective members. Employees within three to five years or more of retirement attend. More often, seminars 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. Circumstances beyond the control of the PRS speaker can determine success or failure at recruitment.

Sometimes, PRS leaders are able to collect the names of attendees by offering a complimentary copy of *NARFE* magazine or other information related to specific retirement questions or concerns. Agencies may or may not allow names to be collected. The key points to emphasize during a seminar are legislative achievements, current legislation affecting their retirement, and how, in general, NARFE looks out for the interests of federal employees now and in retirement. Recently, NARFE's Retirement Benefits Service Department began to run its own seminars.

Guest Registers

The membership committee should collect names, addresses and phone numbers (if possible) of nonmembers attending general meetings or special events, such as health fairs, county fairs, etc. National will underwrite the cost of mailings to event attendees in special cases.



Local Newspapers and Other Publications

Inform your community about upcoming meetings through newspaper activity columns. Use radio and TV announcements as well. Always include the name and telephone number of a contact person. List meeting date, location, guest speaker and subject. If there is a cost (such as lunch), state that as well. Your chapter can also create a Web site and/or collect e-mail addresses of potential members. Public relations efforts are usually free, but you may want to consider paid advertising, such as newspaper ads, radio or TV spots.

Community Bulletin Boards

Post NARFE information in public libraries, federal buildings, retirement communities, apartment buildings, grocery stores, senior centers and hospitals. Many of these are also good places to leave copies of *NARFE* magazine.



Rosters

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 nonrenewing members who are, in fact, "unreported" deaths or those too ill to continue NARFE

membership. Great tact should be exercised in contacting former members.

Suggested Prospect Tracking Techniques

- ★ **Designate specific members to compile and update prospect lists from all known sources.**
- ★ **Record the name, address and telephone number 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.**

Tracking Prospects

It is important to be organized. Though many prospects may ultimately join, not every contact will click on the first try. Months or even years pass before a prospect decides to send in an application. It is not unusual to find people joining NARFE 20 years after retirement. Keeping good records on each contact is important to ensure each prospect receives the proper information and is encouraged to join. This monitoring procedure will also record the membership committee's accomplishments in recruiting members.

Recruiting Techniques

Opportunities for recruitment are everywhere and surface 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 smaller yet for spouses.

When approaching a prospect, always recognize the prospect's 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 needs of the prospect and relate those needs in terms of NARFE benefits. Know the "hot buttons" and today's issues. *NARFE* magazine is an excellent source of information about issues affecting current employees and retirees. Beware of generational differences. 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. Current 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 and message is so important.

The key to recruitment is to go forth and recruit. Nike puts it so well, "Just do it!" Recruiting requires a commitment. While each chapter has the resources (volunteers, leadership and training), only about 1 percent of NARFE members actively recruit new members. Recruiting involves contacting people and telling them about NARFE. The specific techniques will vary, depending upon the availability and use of resources and personalities of the people involved.

The Recruiting Message in Words

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. Promote benefits, not just features. *NARFE* magazine is not only a monthly magazine, but also includes valuable information about retirement issues. While your 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.



TIPS FROM THE FIELD

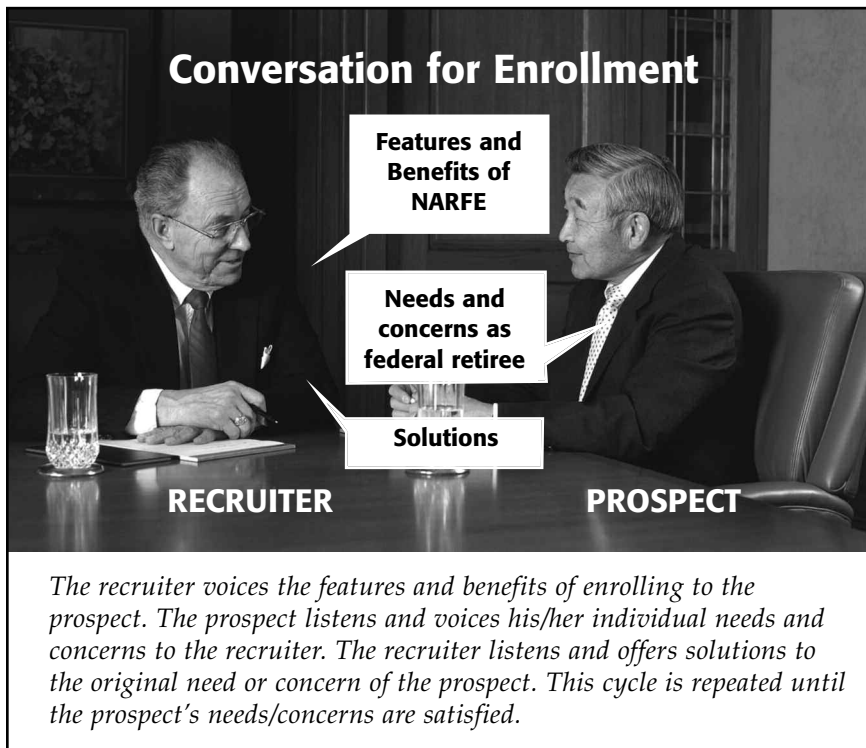
**Don't leave home without
a membership application!**

*Submitted by Bernard Goldsborough,
NARFE Chapter 969*

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. At this point, it is useful to have an application in purse or pocket or an array of literature on your display table. Conviction is more important than glibness. Be yourself and tell prospects why you joined. Often, you can touch one of those buttons as a response to “What is NARFE doing about ... ?” Knowledge and a willingness to help can go a long way. The chapter should encourage members to:

- Bring prospective members to monthly meetings.
- Talk about NARFE everywhere (doctors’ offices, grocery stores, church, etc).
- Assist at pre-retirement seminars.
- Sponsor recruiting events and invite (nonmember) friends.
- Participate in membership drives as teams or individuals.



Direct Mail

Direct mail is a recruitment package sent to a prospective member either by request or initiated by the chapter, federation or National office through an acquired list. In direct mail, prospects receive printed information about the advantages of NARFE membership. It is best to choose NARFE literature that will fit a standard size number 10 envelope. There are many pieces of literature that can be included, but some basic rules should be followed. A signed cover letter should be the first piece read by a prospect. Make the letter as imaginative as you can; from join now and save \$\$\$ to come to our

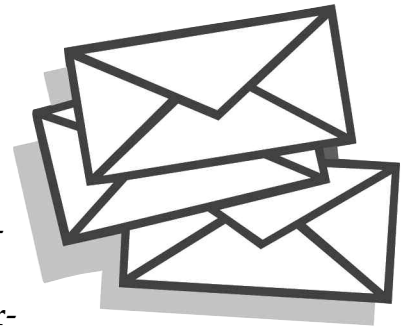
chapter meeting and lunch is on us . . . whatever will work for you! Second, include a return envelope, preferably pre-addressed and stamped. Third, keep your message simple and to the point. Fourth, provide a contact with telephone number so a prospect with

questions has someone to call. You could include in your mailing:

- Membership application
- Information on the local chapter (a special brochure or flyer)
- Name of chapter contact and telephone number
- Reprints of newspaper articles about chapter activities
- Copies of *NARFE* magazine (if your budget can support additional postage)
- Letter from the chapter president (signed)
- *NARFE* brochures
- Chapter newsletter
- Invitation to chapter events included in cover letter.

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

- Ensure information contained on the prospect list is correct (name, address, telephone number).
- Always follow up with a personal contact (face-to-face or telephone).
- Coordinating a mail campaign with a chapter event provides a natural opportunity for personal contact.
- Organize volunteers to address envelopes, affix postage, mail and follow up.
- Respond to any inquiry immediately.



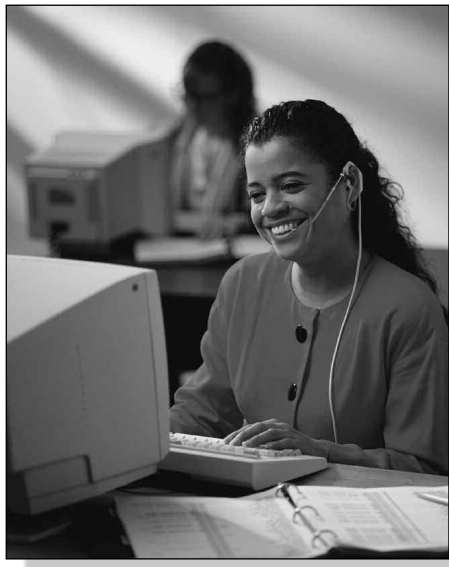
Follow-Up from Pre-retirement Seminars

At times, chapters may have access to the names and addresses of pre-retirement seminar (PRS) attendees. At other times, National will be able to follow up and pass this information along to chapters on the M-112 monthly chapter activity report. For many attendees, the seminar is the first time they became aware of *NARFE*'s existence and how *NARFE* can fulfill the service and the legislative needs of retirees. For most follow-ups:

- Forward all questions from PRS attendees to the appropriate officer or member for response (i.e., send questions regarding pending legislation to the legislative officer; annuity questions to the service officer, etc.).
- Distribute names of PRS attendees to the membership committee for follow-up.

Telemarketing

Telemarketing involves using volunteers to place telephone calls to prospects during specific times. Its primary advantage is 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 cam-



paign when combined with face-to-face or direct mail efforts. Practice this technique. Today, people are bombarded by telemarketers selling products and raising money. 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.” Doesn’t work all the time, but some common ground is better than none.

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 questions and respond pleasantly with appropriate information.
- This method is especially effective if prospects receive advance, written information to prepare them for the call.
- Telephone contact is especially useful in generating participation at events since callers provide personal invitations to attend.

Section Two



Together We Can

Commitment to Membership
Throughout the Chapter

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

Leaders promote the success of member participation by their commitment to membership development. At the chapter level, membership goals are set by chapter officers who delegate responsibility to the membership committee, other committees, and the entire membership. By sharing the responsibilities of membership recruitment with others, chapter leaders reinforce the importance of participation in association activities. It is the responsibility of each and every chapter leader to make membership development a declared commitment and visible priority.

✓ **Use NARFE Meetings to Promote Membership**

Promote membership development during the monthly meeting. Provide time to introduce new members and guests. Report the results of recruitment activities. Recognize new members, recruiters of new members and discuss incentives to participate in membership development activities. No matter how large or small the attendance, devote some time during the meeting to membership.

When committee meetings are held, reinforce the impact and importance of membership development on specific committee goals and objectives.



✓ **Develop a Written Plan for Membership**

Write an annual plan with defined goals to attract new members, satisfy the needs of existing members, train members in membership development and promote the aims of the federation and National. Review the plan every year, re-evaluating and changing it as circumstances dictate. National produces an annual membership plan as do many federations. Chapter plans should complement both of them and be the focus of direct recruitment within a geographical area. Determine how much money can be spent in support of recruitment. Keep in mind that chapter funds are also needed to support retention activities. Federations have "10 percent" funds that can be used for membership recruitment and retention activities. Both federations and National have matching funds programs that can be used for recruitment.

**Start at
the beginning.**

**Begin
with a
Membership
Plan.**

✓ **Set Aside Funds to Recognize Successful Recruiters**

Recognition is a powerful stimulus to further recruiting. Think of prizes and awards as incentives as well as rewards.

✓ **Use Your Newsletter to Promote Membership**

Include a list of new members, successful recruiters, invitations for orientations and a list of new life members or members opting for dues withholding. If chapter membership is on the rise, let members know the chapter is growing. Conversely, if the chapter is losing members, advise members that work is needed to reverse a downward trend.

✓ **Display Membership Services and Literature Attractively at Meetings**

Display recruitment literature that's available, point out what's new, and encourage members to take literature and applications with them. Bring applications to monthly meetings and print an application in your newsletter. Point out that every issue of *NARFE* magazine carries applications.



✓ **Make Membership Applications Available**

Always bring applications to monthly meetings. Print an application in your newsletter or insert an F-14S. Point out that every issue of *NARFE* magazine carries applications.

Leadership Strategies

The more people involved in recruitment, the better the result. Having written that, the editors of this manual are well aware of the problems in recruiting volunteers to meet federation and chapter needs. It is a serious problem for many chapters to find members willing to take officer and committee assignments. That is why we stress that attention should be lavished on new members.

**Remember
the letters
KISMIF.**

**Keep It Simple
Make It Fun.**

Involving Other People:

- Invite and welcome members to assist you on your committee. Do not expect people to call you.
- Create jobs, based on skills and abilities, for any volunteer willing to participate.
- Include as many members as possible in making decisions and setting goals.
- Create a sense of teamwork throughout the chapter.
- Acknowledge all work done on behalf of NARFE.
- Be specific about committee assignments. The better a task is understood, the less work it will seem and the better chance of success.

Motivating Members

- Develop a plan of action for membership and inform the entire chapter.
- Communicate with members regularly so you know what progress has been made and how they are doing.
- Use every opportunity to say “thank you.”
- Provide training.
- Delegate responsibility.

Ensuring 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 involved are important.
- Monitor and modify the plan as needed.
- Clearly communicate your specific expectations with everyone at the start of any project.

NARFE is the sum total of its members. Each member contributes to and influences the group dynamics. In membership development, there are many roles for people to play. People feel a sense of accomplishment when they know what they are doing will make a difference. Membership development offers many opportunities for participation. At least one person in each chapter, regardless of resources, should be accountable for membership development. Ideally, many members will be involved, thus reducing the workload and increasing participation within the local chapter and providing training for future membership chairs.

Creating a job title for each function of membership development allows many mem-

bers to play important roles. Depending on the chapter goals, resources and activities, these roles can be combined into one position or additional roles can be created.

Membership Committee— Goals and People

Purpose and Goals of the Membership Committee

Working together for membership development, the committee's objectives are to develop a recruitment and retention plan that identifies and promotes the benefits of membership. A second goal is to develop among all members the sense of responsibility and commitment to membership growth, development and participation.

Suggested Goals for the Membership Committee

With the support of chapter officers, all of the following suggested goals are achievable and important to the future of the chapter. Below are examples of goals that could be set by the committee. Keep in mind that each must be followed by statements, such as, "This is how we intend to accomplish this goal ..."

- Increase the number of new members recruited over last year.
- Increase the number of new members per month by five.
- Increase the number of members joining through pre-retirement seminars by three.
- Increase the number of members participating in all membership development activities by three.
- Increase the number of members who are current federal employees by two.
- Increase the number of NARFE spouse members by two.
- Develop and conduct five new-member orientations.
- Increase the number of member renewals.
- Increase the number of members who participate in the dues withholding program by 10 percent.

BASIC OBJECTIVES OF THE COMMITTEE

Develop a recruitment and retention plan that identifies and promotes the benefits of membership.

Develop among all members the sense of responsibility and commitment to membership growth, development and participation.

Suggested Tasks for the Membership Committee

Since member abilities and motivation differ, it is the responsibility of the membership committee to create opportunities for the participation of all interested members. The membership chair can appoint subcommittees to address each area. While some membership tasks can be completed in a short time, others take longer. Consider the time commitment of each task when seeking volunteers. Volunteers may:

- Discuss, plan and write the annual and long-term membership plans.
- Train assistants for pre-retirement seminars.
- Promote pre-retirement seminar participation in federal agencies.
- Communicate with new members after they join, prior to renewal and at some interval in between.
- Greet new members at meetings.
- Communicate with renewing members by writing newsletter articles that stimulate member participation in chapter activities.
- Design and implement a recognition system for members involved in recruitment and retention.
- Design and implement community activities to promote NARFE membership.
- Assemble various information kits used for membership (pre-retirement seminars, orientations, special mailings) functions.
- Coordinate membership activities with other chapter committees.
- Develop a prospect tracking system.
- Design and conduct membership drives involving the entire membership.
- Consider retention goals as well.



***Every chapter
has leaders.***

***A good leader
can recognize
the potential in
others.***

The Role of Members Serving on the Membership Committee

Not every position will exist in every chapter. In a small chapter, one person may have to do it all. Successful chapters grow through participation.

Membership Chair

The membership chair is a leader who can recruit people for the committee and who can help accomplish the chapter's goals in the most efficient and rewarding way by motivating others. Every chapter has potential leaders. These are the members committed to success. The most successful membership chairs are

people who love their jobs, viewing their work as a labor of love while understanding that membership development is in fact a survival skill. The membership chair's goals should include:

- Inviting members to assist you and the Association
- Creating jobs, based on skills or desire, for any volunteer willing to participate
- Including as many members as possible in making decisions and setting goals
- Creating a sense of unity throughout the chapter
- Acknowledging the positive results of recruitment
- Communicating on a regular basis
- Delegating responsibility.

The membership chair should be able to:

- | | |
|----------------------------------|---|
| ★ Inspire others | ★ Organize and manage people and events |
| ★ Produce results | ★ Have a sense of humor |
| ★ Support and acknowledge others | ★ Delegate responsibility |
| ★ Be flexible, yet goal-oriented | ★ Enjoy the work |

The Chair's Objectives for the Committee Should Include:

- Establishing specific, measurable goals
- Creating, documenting, implementing, monitoring and managing a membership plan
- Conducting monthly/quarterly committee meetings
- Reporting monthly membership activities to chapter officers and members.

New Member Coordinator

This manager can:

- Compile names and communication information about potential members
- Assist recruitment efforts at pre-retirement seminars
- Inform all new members about NARFE services
- Keep in touch with new members
- Encourage new members to assume active roles within the chapter
- Remind members to renew on time.

Pre-retirement Seminar Leader(s)

For a full description of the responsibilities of this position, refer to NARFE's Pre-retirement Seminar Guidelines (FH-20). This position requires an apprenticeship and training. Often, contractors who are not members of NARFE conduct seminars, with or without the assistance of NARFE members. Some contractors are NARFE members.

PRS Leaders:

- Arrange seminar participation with necessary logistics
- Request other members to assist in the dissemination of information
- Explain the benefits and services of NARFE to attendees
- Approach government agencies or private contractors to obtain permission to speak to attendees
- Are knowledgeable about NARFE's contributions to protecting the benefits of retirees and their families
- Contact attendees who become prospects.

Orientation Coordinator

This member conducts in-house seminars or provides information in print for new and renewing members on the benefits and services of NARFE membership.

This member will:

- Understand the Association's services, activities and structure thoroughly
- Organize and host regularly scheduled orientations
- Encourage the participation of chapter leaders
- Promote participation in chapter activities to new members
- Create a rapport between new members and existing members.

Retention Coordinator

This committee member generates long-term stability for the chapter. The larger the chapter or the more nonrenewals of annual members, the more people may be required to serve as coordinators. Important job functions are to:

- Contact all members who have received a second renewal notice
- Encourage the recruiters of new members to contact the members they enrolled and promote renewal
- Work with the orientation and membership coordinators to promote renewals
- Respond to any member voicing a negative opinion about the Association to find out what the problem is and how it can be solved

- Survey nonrenewing members by phone or mail to determine why they failed to keep their membership current
- Actively promote multi-year dues, dues withholding, and life membership programs
- Encourage members to use dues withholding.

Membership Trainer

This member promotes the positive aspects of membership development so more members can participate in membership recruitment. The specific responsibilities are:

- Conduct membership development training periodically at the chapter level and encourage members to attend district and federation training seminars as well
- Promote the fun and enjoyment of participating in membership development (remember KISMIF!)
- Assist the membership chair in identifying new committee members.



Membership Administrator

This member is the key in the paper flow between chapter, federation and National. Suggested responsibilities are to:

- Support the secretary and/or treasurer in processing forms
- Implement any recognition system used by chapters
- Assemble information kits for new members, pre-retirement seminars and orientations.

TIPS FROM THE FIELD

Setting up a NARFE booth at the local mall can be an effective method for member recruitment.

- Keep informed about activities at your local mall or any place that permits a display booth.
- Order materials, available on the F-18 order form, from the National Office. (Allow a minimum of three weeks for delivery before the event.)
- Set up a display or table with information about NARFE and your local chapter activities.
- 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 of visitors. Offer a free one-year membership as a prize to encourage sign up.
- Send a note to each prospective member thanking them for stopping and inquire about their intentions to join or attend a meeting.

Submitted by Peggy Garland, Treasurer, NARFE Chapter 324

Chapter Membership Drives

- **PLAN**
- **ORGANIZE**
- **STAFF**
- **DIRECT**
- **EVALUATE**

Membership drives are an opportunity for the entire Association to concentrate on development. The drive represents the best planning, promotion, training, leadership, communication and participation by members, sometimes with the assistance of the federation and/or National staff. The drive can be designed for implementation by telephone, direct mail or face-to-face recruitment.

Five Management Principles for an Effective Membership Drive

Five basic management principles are useful in conducting successful membership drives. Each chapter can adapt these principles to its volunteers, leaders, resources, budget, goals and objectives. The individual chapter variations are as numerous and creative as the number of chapters in NARFE.

Plan

- Determine what type of drive the chapter will conduct.
- Define the scope of the drive by establishing dates to conduct the drive and key identifying members who will participate as well as the resources needed and available.
- Set specific goals and communicate them to the members.
- Check the chapter calendar. Use other events to complement and expand any membership effort. Avoid conflict or competition with other events.
- Update the prospect list. Prepare necessary literature and information.

Organize

- List the action items to accomplish and who will be responsible.
- 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 and recognition for volunteers.

Staff

- Choose and train the appropriate people for the drive.

- The more prepared volunteers are to take on a task, the more successful they will be.
- Leaders and recruiters must be enthusiastic and knowledgeable about NARFE.

Direct

- Lead, motivate and modify the drive to keep the momentum going.
- Communicate regularly with all participants and leadership. Short-term drives 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 drive.
- Recognize everyone who contributed to the effort.

Suggestions and Ideas for Membership Drives

Recognition for Recruiting Efforts

Member recognition is critical to the success of any volunteer effort since it encourages continuing volunteer achievement. Just a simple “thank you” goes a long way in recognizing and encouraging member participation.

Individual needs for recognition vary. Some people are motivated by tangible rewards, while others are satisfied with name recognition that results from a successful effort. Every member’s contribution should be acknowledged. Listed below are suggested ways to acknowledge the efforts of volunteers:

- Participants in the drive are recognized by the chapter president.
- Volunteers and new members are applauded by the entire membership for each new member enrolled.
- New members enrolled during the drive are introduced by their recruiter.
- Information is attractively displayed at each chapter meeting during the drive. Include the names of volunteers, areas of responsibility and accomplishments to date.
- Top recruiters are recognized by the chapter president during chapter meetings/events and at the federation’s annual convention.

- Results are published in the chapter newsletter with names of recruiters and members recruited.
- A “thank you” letter from the chapter president is sent to each recruiter.
- Recruiters receive a pin, plaque or certificate based on the number of members enrolled.
- Participants in the drive wear a special ribbon or button to chapter events during the drive.
- Volunteers wear special name badges at chapter events, especially during a drive.
- A “Recruiter of the Month” is highlighted in the chapter newsletter.

Plan the Action

A successful membership drive depends on advance planning. Use the following suggestions to help plan the next membership drive.

Objectives

Definition:

A statement of what you plan to accomplish and how achieving that goal will support the overall Association mission.



***Success depends on
advance planning.***

***The more thorough
the planning, the
better the chance
of success.***

Criteria:

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

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



Definition:

Methods to achieve the objectives

Criteria:

- Specific actions and tasks are matched to each objective.
- Each task is clearly defined and understood by all participants.
- Strategies are prioritized and contain timelines for tasks to be completed.

Examples:

- Develop a recruitment training session for members interested in joining the membership development effort.
- Identify methods and procedures for communicating the benefits of NARFE to members and nonmembers.
- Distribute membership literature at monthly meetings and encourage individual recruiting.
- Establish a welcome committee. Organize and conduct orientations.

***Once a program
is begun, track
the results.***

Be objective.

Responsibilities and Resources

Definition:

Someone must be accountable for the direction, management and completion of each strategy and objective. Chapter leadership must endorse the objective, allocate financial assistance and support member involvement.

Criteria:

- A specific person is named to lead the drive.
- Recruitment activity begins and ends on a specific date. Tracking midpoints, milestones or levels of achievement help monitor the drive.
- A budget is allocated. It is important to know the source of funding, how it is spent and the results achieved. Comparisons can be made to past and future efforts.

Examples:

- Every chapter committee provides at least two members to assist the membership committee in conducting monthly orientations for new members and/or training sessions for recruiters.
- New members are hosted at their first meeting by an existing member.
- The drive is promoted in the chapter newsletter, during meetings and in special mailings.

Using Incentives in Recruitment Campaigns

Innovative incentives can be an effective way of inspiring members to recruit. A former federation chair issued the following campaign announcement to the members in his chapter.

Beginning (specific date) and ending (specific date), any NARFE member recruiting new members for the chapter within the time frames will be awarded prizes.

- Recruit ONE new member, and you will be eligible for a \$25 cash drawing. (Set four separate dates for drawings within the membership drive's time frame.)
- Recruit THREE new members, and you will receive a Cross pen.
- Recruit FIVE new members, and you will be eligible for a \$50 cash drawing.
- Recruit SEVEN new members, and you will receive a watch with the NARFE logo engraved on its face.
- Recruit NINE new members, and you will receive two years of national and chapter dues.
- Recruit FIFTEEN new members, and you will receive a \$100 savings bond.



TIPS FROM THE FIELD

Use *NARFE* magazine as a recruiting tool by giving a recent copy to a potential member, along with promotional material and an application for membership. Mention one or two significant items in the issue to assist in capturing the interest of the prospective member.

Submitted by Lyle M. Elverud, NARFE Chapter 2243

Good Chapter Meetings = Better Recruitment

Two chapter officers have found an invitation to attend chapter meetings as a guest is one of the most effective recruitment tools. The quality of your meetings can be a decisive factor in member retention. To ensure a large audience at your chapter meetings:

- To the extent possible, the chapter's meeting facility should be conveniently located, attractive in appearance, free from outside distractions that interfere with speakers, large enough to accommodate the membership and have adjacent parking.
- Food service, whether full meals or afternoon tea, coffee or snacks, should be suited to typical retiree diet needs. In other words, light but tasteful and provided at a reasonable cost.
- Meeting programs should be a good balance of essential chapter business, informative discussions of matters that concern NARFE and opportunities for informal social contacts. Regular legislative reports providing brief summaries of issues that National is emphasizing are welcomed by members. In addition, and whenever possible, we provide brief talks by outside speakers, often local government officials.
- We find meetings are best scheduled at the same place, time and day of the month, thus enabling members to keep track of them on their personal calendars. However, we depend heavily on a chapter telephone committee that gives telephone notice of meetings to all members a few days in advance. This committee also determines probable attendance and reports it for food service planning.



TIPS FROM THE FIELD

Conduct an "Open House" for federal retirees who are not NARFE members.

*Submitted by Dolores Gentry,
NARFE Chapter 242*

Establish a Recruiting Committee

Here are a few suggestions from the field:

- Establish a membership committee by electing a chairperson and appointing specific members to work on membership recruitment.
- Hold regular committee meetings where each committee member brings prospect names.
- Divide the prospect names equally among the committee members.
- Committee members work in pairs to contact the list of prospective members.
- After contacting potential members, committee members provide an information packet, a letter from the membership committee, and a list of meeting time and places. A pitch for membership is made at this time.
- Each month the membership committee calls the prospects to invite them to a chapter meeting. An additional pitch for membership is made at this time and at the chapter meeting.
- During the chapter meeting, the membership committee requests names of potential members in order to start the recruiting process again.

Membership drives are an opportunity for the entire Association to concentrate on development of the chapter. The drive represents the best planning, promotion, training, leadership, communication and participation by the members, and can be designed for implementation by telephone, direct mail or face-to-face meeting.



TIPS FROM THE FIELD

Interesting speakers and programs can tempt potential members and first-time members to return. Send a chapter meeting announcement to all of your prospects. You can also post information about meetings in public places: hospitals, libraries, doctors' offices, Social Security offices or on bulletin boards at government agencies.

**WANT SOME GOOD ADVICE?
Join us for a Financial Seminar**

Date: Thursday, March 14, 1:30–3:30 pm
Place: Lexington Senior Citizens Center, XXX Nicholasville Rd.
Program: **Investment & Tax Planning:**
Alternatives to taxable income for retirees.
(Speaker's Name)
**Estate Planning: How to Keep the IRS from
Being Your Biggest Beneficiary.** (Speaker's Name)
**Parking space is usually available on the grounds of the Senior Citizens Center.
In the event all spaces are taken, additional parking is available at the church
across the street.**

Stop everything and give us a hand!



Help us...

- **Recruit new members**
- **Present to all federal employees and retirees the advantages of belonging to NARFE**
- **Remind all federal employees and retirees that NARFE has assisted in passing many important pieces of legislation**

Submitted by Dorothy F. Witte, NARFE Chapter 1160

Section Three



Retention

An Integral Part of
Membership Development

Ensuring Member Renewals



Retention is an ongoing process. Studies conducted by associations reveal a direct correlation between members who renew and their participation in association programs.

***Retention begins
on day one!***

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 recruited at the chapter level before or after retirement. Once recruited, that member is now your member and needs to be cultivated and nurtured.

- Encourage members to promote NARFE at every opportunity.
- Remind members that they always represent NARFE to the public.
- Send new members a special mailing during their first six months; include a calendar of upcoming events and a list of available services.
- Encourage new members to attend chapter meetings and participate in events.
- Contact members who do not renew to find out why they did not attend chapter meetings and invite their participation.
- Accommodate current federal employees and their schedules.

Personally Welcome New Members

Ask new members to fill out a personal/professional information profile of their skills, abilities and preferences. Let them know these will be used to encourage their involvement in the Association activities. If you do this and promise to place a new member on a committee, then be prepared to do exactly that. Nothing can be as discouraging as enthusiasm rebuffed or ignored. Many new members have taken on top leadership positions within months of joining.

- Print reminders of upcoming orientation meetings in the chapter newsletter.
- Encourage husbands/wives to attend.

Involve New Members Immediately

There is a correlation between members renewing and their level of involvement in the Association's activities. Are there sufficient opportunities for member participation? If all new members joined a committee or attended the chapter's activities, would their participation be welcomed? Your chapter wants and needs active members.

Matching member skills and abilities to appropriate tasks gets members involved, and helps them realize the full value of their membership. Sometimes, chapter leaders enjoy leadership roles for years “doing it all,” and then “discover” no one willing to step forward and fill their shoes. When a chapter is on the verge of folding, “lack of interest on the part of members” is sometimes cited as the cause.

- Refer to the member profiles obtained at orientations or through mail surveys. Use these to design participation tasks.
- The chapter president can personally ask new members to be involved within their first six months of membership.
- Send an invitation from the chapter’s executive committee to the new member to attend the next general membership meeting.
- Request new members to sign up for at least one committee in the chapter.
- As a chapter leader, know when to let go.

Recruitment Impacts Retention

New Members Are Oriented. Existing Members Are Re-oriented.

Association studies reveal orientations for new members within the first months of joining contribute to retention. It is a common mistake for associations to “assume” existing members also know about the benefits to members. Offer to include those members scheduled for renewal in orientations. Invite spouses since their involvement can improve retention.

- List committees in the chapter newsletter with names of participants
- Recognize new member participation at meetings
- Publicize orientations.

Recognize Membership Development and Retention Publicly

Don’t forget to recognize and thank volunteers, especially those who push retention. Too often the rewards of membership fall to the more visible recruiters. There are many parts to a successful membership development plan: development, recruitment, orientation, participation, leadership, recognition, communication and retention. Each area deserves a form of recognition.

- Seat members involved in retention at the head table during a general meeting promoting membership.



**Does your
chapter “allow”
new members to
participate?**

- Members active in generating renewals can wear special name badges at general membership meetings.
- Use the newsletter to feature members active in membership development. Be specific about their achievements.

Members Will Stay With an Effective, Active Chapter

Be Sure Your Chapter's Services Meet Your Membership Needs

It is essential to know how to promote NARFE services that fulfill every member's needs. NARFE has many thousands of members who are still working. Their needs and expectations are different.

- Take inventory of current benefits and services. Determine what to say about each to the different constituencies in your chapter.
- List the services for currently employed members or develop a new program.
- Highlight a NARFE service (chapter, federation, national) in the newsletter.
- Sponsor specific events for spouses of current employees.
- Schedule some evening meetings and events, or schedule a Saturday meeting event for working members. Retirement from federal service does not mean retirement from work. Often, today's federal retirees take another job. Maybe your regulars may not come to an evening meeting, but a whole new group of members you've never seen before may show up. Don't give up if it doesn't work the first time.



***Do you really know
your members?***

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

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

Keep Volunteers Well-Informed

An association cannot expect to be truly successful without training its volunteers. Knowledge about NARFE benefits, services and membership helps volunteers communicate with confidence and authority.

- Use orientations to train members interested in recruitment, retention and conducting pre-retirement seminars.
- Members interested in membership development leadership can serve as assistants or speakers at pre-retirement seminars.
- Participate in district/federation training sessions.

Encourage Participation Through Chapter Communications

From personal contact to printed publications or the design of Association activities, Association communications will have an impact upon a member's participation and subsequent renewal. With the diversity of members currently in NARFE (retirees, survivors, spouses, current federal employees...), effective communications are vital in motivating members.

- Use the newsletter to recognize new members, renewing members and members transferring in or out of the chapter. List members who have not renewed and suggest that members who know nonrenewals contact them.
- Print monthly reminders about renewing in the chapter newsletter. Use fun phrases and slogans. Hold a renewal contest with a reward for everyone if a target is met.
- Write special columns in the newsletter covering all phases of membership.

Recognize Members Who Renew

The chapter is committed to renewing every member. The Association leadership is responsible to promote membership involvement and renewal. NARFE leadership can promote the benefits of NARFE membership at general membership meetings, in the newsletter and through specific membership programs.



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. Large chapters can recognize longevity; small chapters might list every renewing member in the newsletter. Most people like to see their name in print.

Thank Renewing Members for Their Continued Support

Recognition for renewing is positive reinforcement. It motivates and encourages members to participate. The benefits far outweigh any expense to the chapter. Since recruitment is geared

TIPS FROM THE FIELD

Use NARFE stationery, bumper stickers, window decals, Join Us buttons and other promotional items to continuously make people aware of NARFE.

*Submitted by
Dolores Gentry,
NARFE Chapter 242*

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.

Section Four



Appendices

Useful Information for
Membership Development

What Is NARFE?

NARFE is a nonprofit, nonpartisan membership organization committed to promoting and protecting the individual and family interests of people who share a vested interest in the federal retirement system. There are nearly 350,000 NARFE members.

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
- A former spouse who is legally entitled to a federal survivor annuity.

*Prior to October 1, 1987

Typical Questions Prospective Members Ask

- 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 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?

- Assertive legislative representation on federal and state levels

- Informative, award-winning monthly magazine, *NARFE*, the prime source for information about federal retirement and health care issues
- Up-to-date information through www.narfe.org and NARFE e-mail
- Liaison with the Office of Personnel Management (OPM)
- Discounts on car rentals, hotels, auto insurance, etc.
- Travel packages, group tours and savings through NARFE Travel Services
- NARFE MasterCard program
- Health, life, dental and long-term care insurance programs
- United network of support with other federal employees and retirees
- Opportunities for leadership, political action and community service.

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. The service officer in your local chapter is trained to 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 aided by the Retirement Benefits Service Department at NARFE Headquarters, which works directly with OPM to resolve difficult cases.

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? However, NARFE is the only organization 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 primarily from the private sector whose 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 members pay the same first-year membership fee. Renewing members pay annual membership dues (National) plus chapter dues, which are determined independently.

Membership Payment Options

Dues Withholding

- Convenient and economical, this payment option authorizes the Office of Personnel Management to withhold the annual dues (National plus chapter fees) from a member's monthly annuity. Dues cannot be deducted from the paychecks of a current federal employee.
- A first-year fee and/or renewing national and chapter dues are withheld from the monthly annuity check at the rate of 1/12 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 60-90 days for processing.

Members on dues withholding receive NARFE's lowest dues rate. NARFE has stressed dues withholding as an excellent renewal tool. Chapter (or federation) leadership cannot effectively promote dues withholding unless the leadership itself is on dues withholding (or life members). This is leadership by example.

Current employees may not participate in dues withholding. NARFE has a dues withholding agreement with OPM only. We cannot enter into dues withholding 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 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. Applicants can also use the "bill me" option. However, NARFE would prefer to minimize billing to reduce cost of application processing.
- 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 also referred to as "LSAs," which means they are in the chapter's ZIP code area and are part of the chapter's total membership.
- Cash payments should not be accepted. Insist on checks, money orders or credit card payments. Dues may be renewed by credit card online, through the mail, or by calling Member Records at 1-800-456-8410.

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

The Complete Recruiter

- Always carries a membership application
- Tells others how NARFE personally benefited them
- Relaxes and puts on a friendly face
- Listens carefully to learn the prospect's interests and concerns
- Watches for nonverbal communication (e.g., posture, eye contact, etc.)
- Encourages questions and is prepared to answer predictable ones
- Meets negative comments with positive ones
- Invites interested friends, neighbors and acquaintances to local chapter meetings or other chapter-related events
- Enlists the help of other members close to the prospect
- Helps new members feel at home and able to make a contribution.

A successful recruiter does not:

- Give up after one try.
- Disagree with a prospect, but instead concedes a legitimate point or objection and offers additional information that may alter the prospect's perspective.
- Presume anything without asking questions.
- Plead with a prospect to join because the membership will not last.
- Be offended if a prospect declines an invitation to join. Rejection is not personal.
- Argue, frown, complain or be discouraged by anyone who does not join. Keep smiling and recruiting!

NARFE's National Office has many recruitment aids available free of charge to help federations and chapters recruit and retain members. Supply form F-18 lists all materials available. Since products periodically undergo revision, check the *Quarterly News* or the membership pages of *NARFE* magazine for new publications or announcements of revisions to existing publications.

Membership Campaign Support Materials

Materials available include posters, newspaper ads, reproducible artwork and other aids, along with brochures and applications to assist chapters in conducting a recruitment campaign. Federation and chapter officers are encouraged to call Recruitment and Retention or Public Relations at National for advice and information about marketing membership. To order these publications, see the F-18 Requisition for Printed Supplies form online on our Forms page or order one by calling 1-800-627-3394.

NARFE LetterBook

This recruitment and retention aid contains sample letters for many occasions. These letters are found online on our Forms page at www.narfe.org.

Tabletop Displays

The National Office has lighted table-top and table-side displays for use by members when representing NARFE at a health fair, community event or a government agency. The displays promote NARFE and will attract prospective members to your exhibit space. You may borrow one by calling the Recruitment & Retention Department at 800-627-3394.

Outbound shipping charges are paid by National; inbound or pass-a-long 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. Literature to support exhibits, fairs, etc., can be ordered at the same time the booth is reserved.

“Logo Plus” Computer Disks

The NARFE logo and seal are available electronically to newsletter editors using PC or Macintosh programs.



**National Active and Retired
Federal Employees Association**

Recruitment and Retention Section
606 North Washington Street
Alexandria, VA 22314
1-800-627-3394
www.narfe.org

FH-19 (12/10)