



# **Washington State Federation Strategic Plan**

27 September 2023

# **NARFE is facing a crisis!**

Our membership is declining at a rate that will make NARFE irrelevant in 10 years or sooner. Without a critical mass of members our ability to accomplish our mission comes into question. To defend and advance the earned pay and benefits of America's civil servants and to promote the general welfare of federal civilian employees and annuitants, we need sufficient members to retain the attention of our congressional representatives and to maintain vibrant chapters.

We need to focus on recruitment, if we want NARFE to continue to serve federal civilian employees and annuitants.

In our strategic plan, we have made the choice to focus our attention on recruitment. Other important ideas were considered and retained for future reference, but we believe those other ideas can be deferred while we focus over the next two years on our most major issue -- RECRUITMENT. In addition, we anticipate continuing routine operation such as advocacy, protecting our benefits and member services.

This plan is intended to be a tool to focus each chapter on RECRUITMENT and assist each chapter with ideas for engaging potential new members.

We use the term "Chapter President or designee" throughout this document to refer to the individual within each chapter responsible for leading recruitment activities within the chapter. Different chapters use different titles.

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<b>NARFE WA Federation Strategic Goals</b>				
<b>Strategic Goal 1: GROW MEMBERSHIP BY 10% (~400 NEW MEMBERS)</b>				
<b>S</b> pecific & Strategic	<b>M</b> easurable	<b>A</b> ligned	<b>R</b> ealistic	<b>T</b> imeframe
<b>1-1 Increase membership to a level to sustain and fill elected and chair positions.</b>	Track officer and chairmanships via district vice president (DVP) reports	2. To promote the general welfare	Y	
<b>1-2 Jump start the recruitment effort for each chapter, by focusing each chapter on health fairs as recruitment opportunities.</b>	Have the chapter outreach lead report at chapter meeting and include presentations in DVP reports	2. To promote the general welfare	Y	
<b>1-3 Expand recruitment efforts, for each chapter, by identifying recruitment opportunities for new members prior to retirement within chapters' geographic area.</b>	Track through local chapter president or designee and DVP reports	1. To defend and advance the earned pay and benefits	Y	
<b>1-4 Support recruitment efforts, for each chapter, by designing a formal advertising campaign for each chapters' geographic location (based on 1-3.3) and targeted audience.</b>	Track through local chapter president or designee and DVP reports	1. To defend and advance the earned pay and benefits	Y	

# **Washington State Federation Strategic Action Plans**



<p><b>1-1.2</b></p>	<p>As new members are identified and as current members reengage, the chapter president or designee should try to match the members interests with Chapter activities and work with the current chapter officers to recruit new members into vacant officer/chairperson roles. Product: a list of new chapter officers.</p>	<p>Chapter president or designee</p>	<p>On-going</p>	
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**Strategic Goal 1-2: Jump start the recruitment effort for each chapter, by focusing each chapter, on health fairs as recruitment opportunities.**

**1-2.1** Assist each chapter to work with health fair coordinators to find health fairs in their geographic area

**1-2.2** Conduct specific recruitment events at available health fairs.

	<b>Activities</b>	<b>Lead Responsibility</b>	<b>Time-line</b>	<b>Resources</b>
<b>1-2.1</b>	Assist each chapter to work with health fair coordinators to find health fairs in their geographic area  Host a FEHB health fair at a chapter meeting	Federation outreach chair or designee  Chapter president or designee	Aug 2023	1-2.1 Hosting an FEHB plan health fair at a chapter meeting
<b>1-2.2</b>	Conduct specific recruitment events at available health fairs. Attend an agency FEHB plan health fair.	Chapter president or designee	Nov-Dec	1-2.2 Attending an agency FEHB plan health fair

**Strategic Goal 1-3: Expand recruitment efforts, for each chapter, by identifying recruitment opportunities for new members prior to retirement within chapters’ geographic areas.**

**1-3.1** Determine a list of Federal employers in each chapter’s geographic area

**1-3.2** Identify recruitment opportunities associated with each employer (e.g., union meetings, professional association meetings, community events & local hangout spots)

**1-3.3** Evaluate specific recruitment opportunities associated with each employer and rank order the resulting list

**1-3.4** Formally recruit at federal employers’ locations or at other venues where local Federal employees are present as driven by evaluation in 1

	<b>Activities</b>	<b>Lead Responsibility</b>	<b>Timeline</b>	<b>Resources</b>
<b>1-3.1</b>	<p>Determine a list of federal employers in each chapter’s geographic area</p> <p>The federation outreach coordinator will research and maintain a list of all the federal employers and job locations within the state, subdivide the list into sections assigned to each WSF chapter and provide the complete list to each chapter president or designee. Product: A list of potential NARFE recruitment locations and organizations.</p>	Federation outreach coordinator	Implement by Sep 2023	1.3.1 List of Federal employers in each chapters’ geographic area
<b>1-3.2</b>	<p>Identify recruitment opportunities associated with each employer (e.g., union meetings, professional association meetings, community events &amp; local hangout spots)</p> <p>Each chapter president or designee, will review the potential NARFE recruitment locations and organizations list provided by the federations outreach coordinator with the chapter officers. Collectively they will adjust the list by</p>	Chapter president or designee	Implement by Jan 2024	

	<p>adding specific recruitment opportunities (such as local events and employee gathering places) based upon local knowledge and return a chapter endorsed list of recruiting opportunities to the federation outreach coordinator. Product: Chapter endorsed list of potential NARFE recruitment events, locations and organizations.</p>			
<p><b>1-3.3</b></p>	<p>Evaluate specific recruitment opportunities associated with each employer and rank order the resulting list.</p> <p>Working from the chapter endorsed list, the chapter officers will evaluate the feasibility and effectiveness of recruitment efforts at each potential target organization or event. Each chapter can develop their own set of evaluation criteria. As a starting point the following criteria are suggested:</p> <ul style="list-style-type: none"> <li>• Number of potential members to be recruited;</li> <li>• Anticipated level of interest by potential recruits;</li> <li>• Opportunity to reach new member prior to retirement;</li> <li>• Distance to be traveled;</li> <li>• Ease of access to potential recruits;</li> <li>• Availability of chapter members to support the recruitment effort; and</li> </ul>	<p>Chapter officers</p>	<p>Implement by Mar 2024</p>	

	<ul style="list-style-type: none"> <li>• Results of previous recruitment efforts.</li> </ul> <p>The results of the evaluation should be included in the chapter endorsed list of potential NARFE recruitment events, locations and organizations.</p> <p>The chapter president or designee should then select at least 5 target recruitment opportunities for 2024 and 2025 and report the chapter's recruitment plans to the federation outreach coordinator. Product: Evaluated chapter endorsed list of potential NARFE recruitment events, locations and organizations plus the chapter's 2024 &amp; 2025 planned recruitment activities.</p>			
<b>1-3.4</b>	Formally recruit at federal employers locations or at other venues where local federal employees are present as driven by evaluation in 1-3.3	Chapter president or designee	On-going 2024-25	

**Strategic Goal 1-4: Support recruitment efforts, for each chapter, by designing a formal advertising campaign for each chapters’ geographic location (based on 1-3.3) and targeted audience.**

**1-4.1** Create template outline for outreach to current and prospective chapter members and make available to chapters. Outreach to current and prospective members and gather updated member information for NARFE’s Associated Management System (AMS).

**1-4.2** Communicate with current and prospective members through email, direct mail, newsletters, FEDHub, WSF website, advertisements in local papers, letters to paper editors and event announcements to encourage interaction with prospective new members.

**1-4.3** Develop a list of publications, poster opportunities, billboards, websites or other ways of introducing federal employees to NARFE

**1-4.4** Join social media services used by local federal employees and advocate joining NARFE

**1-4.5** For each chapter develop a recruitment schedule of all recruitment-related events.

	<b>Activities</b>	<b>Lead Responsibility</b>	<b>Timeline</b>	<b>Resources</b>
<b>1-4.1</b>	<p>Outreach to current and prospective chapter members and make available to chapters.</p> <p>Outreach to current and prospective members and gather updated member information for NARFE’s Associated Management System (AMS).</p>	<p>Federation outreach coordinator</p> <p>Chapter president or outreach coordinator</p>	<p>9/30/2023</p> <p>Implement by 3/30/2024</p>	<p><b>Attachment 1-4.1A:</b> Written outline of how to reach out to current members.</p> <p><b>Attachment 1-4.1B:</b> Sample telephone script when calling members.</p> <p><b>Attachment 1-4.1C:</b> Sample email for reaching out to members.</p> <p><b>Attachment 1-4.1D:</b> Sample letter to those members that the chapter could not reach via phone or email.</p> <p><b>Attachment 1-4.1E:</b> Sample Welcome Letter to New and/or Prospective Members.</p> <p><b>Attachment 1-4.1F:</b> Outline procedure on how to update NARFE’s AMS database with Member’s new information.</p>
<b>1-4.2</b>	<p>Communicate with current and prospective members through email,</p>	<p>Chapter board and members</p>	<p>Implement by 3/30/2024</p>	<p><b>Attachment 1-4.2:</b> FH-19 <i>Membership Marketing Manual link.</i></p>

	direct mail, newsletters, FEDHub, WSF website, advertisements in local papers, letters to paper editors and event announcements to encourage interaction with prospective new members.			<a href="https://www.narfe.org/wp-content/uploads/2020/12/fh-19-pdf.pdf">https://www.narfe.org/wp-content/uploads/2020/12/fh-19-pdf.pdf</a> List of examples of avenues in which chapters can get the word out on news, events and activities relating to NARFE.
<b>1-4.3</b>	Develop list of publications for outreach, approve budget and schedule to publish	Chapter and board	Implement by 3/30/2024	Supply access and direction on using WSF Matching Funds Request. Develop list of publications from successful chapters
<b>1-4.4</b>	Social Media page, WSF website or other electronic media. Appoint coordinator to update.	Chapter and board Outreach coordinator	Implement by 3/30/2024	
<b>1-4.5</b>	Develop recruitment schedule for recruitment related events	Chapter board	Implement 3/30/24	Supply access and direction on using WSF Matching Funds Request. List examples of community festivals, health fairs, employee reunions

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## **Hosting an FEHB Plan Health Fair at a Chapter Meeting**

### **STEP 1 – Start Early!**

Begin planning early in the year! The health fair schedule is released in July so, if you wish to participate, you need to submit a request by the end of May. Requests are submitted to the FEHB plan rep who compiles the calendar; contact the federation outreach committee secretary for the rep's name and contact information.

Establish a lead person who will coordinate all of the following steps.

Before requesting to participate, determine the length of the event and whether or not you have enough people to staff it. You may wish to schedule the reps for several hours before your normal meeting time as well as for 30 minutes within your meeting time so they can briefly highlight their plans. If so, you will need to arrange with the facility where you hold your meetings to use the space for the additional time.

Contact the federation outreach committee secretary to learn about National and federation 50% matching funds for advertising your event in a local newspaper. Qualifying for matching funds requires having a recruiting table at the event.

### **STEP 2 – Gather Information**

Obtain a copy of the NARFE National FH-19 *Member Marketing Manual* publication from the National website.

- Log in
- Under the "FOR MEMBERS" tab, click "Officer Resources"
- Select "All Forms By Form Number"
- Scroll down and select "FH-19 Member Marketing Manual" (note that this publication is outdated and includes images from the old NARFE website)
- Download the PDF

Or, for a hard copy:

- Log in
- Under the "FOR MEMBERS" tab, click "Officer Resources"
- Select "F-18 Requisition for Printed Supplies"
- Complete the online form, indicate the quantity of items you wish to order, and click "SUBMIT" at the bottom of the page

Review the other information available in this area of the website, especially the "Membership Officer Resources" where you'll find valuable recruiting tips and tools.

Study the FH-19 for ideas on how to set up a table and what supplies you'll need.

### STEP 3 – Establish Your Team

The size of your team will depend upon the length of the FEHB plan health fair you plan to host. A short event could be staffed by one or two people. A longer event will require more people. If so, be sure you have solid commitment from enough people to staff the event. You should have a greeter who welcomes guests and directs them to the rep they wish to speak to. If Wi-Fi is available, you may wish to have a help desk staffed by someone with a laptop or tablet who can look up information if requested. And, you may wish to provide refreshments.

### STEP 4 – Obtain Supplies

Free NARFE Resources – Use the F-18 to order supplies listed in the FH-19. When ordering more than 100 *NARFE Magazines*, call the phone number indicated on the form to make arrangements. Everyone wants November magazines so be flexible and offer to split your shipment between two months, e.g., half September magazines and half October magazines.

Some chapters have ZAP displays; if yours doesn't, contact the federation outreach secretary who may be able to arrange for you to borrow one from a nearby chapter.

It's helpful to have a binder containing the FEHB plan premiums obtained from the OPM open season webpages. There are Fee for Service plans and HMO plans; there are also dental and vision plans. Having all that information handy in one place can be a useful tool for attendees who wish a quick comparison of rates. Be aware that, in some years, a plan's premium for "Self+1" can be higher than "Self and Family"; this is something attendees will appreciate knowing.



Chapter Purchased Resources – NARFE branded table cloths, banners and clothing are available for purchase.

To order a NARFE branded table cloth or clothing go to the NARFE General Store at <https://randdmarketing.four51ordercloud.com/NARFE/catalog>.

Banners need to use the NARFE-approved logo. Contact the federation outreach committee secretary for help with obtaining a print-quality design from the National office. You may then order the banner from an online company like Staples or VistaPrint.

Federation Provided Resources – NARFE branded table runners and pens can be requested from the federation outreach committee secretary. The federation may occasionally purchase other NARFE branded swag for chapter use so be sure to ask.



### STEP 5 – Hosting the Health Fair

A month before the health fair, the lead person must determine which reps will attend the event to know how many tables to set up. For reps who will not be attending, the lead person may request a shipment of brochures and give-away items. Those should be shipped to the lead person who will be responsible getting them to the health fair.



Remember, you represent NARFE so please dress and behave professionally. You can purchase NARFE logo clothing at the NARFE General Store.

Either the team lead or their designated staff should arrive early to set up the recruiting and rep tables. Greet the reps as they arrive and direct them to their tables.

The designated greeter(s) should greet members and guests as they arrive and direct them where they need to go for the service they request.

Those staffing the recruiting table can use what they learn from the FH-19 and the NARFE National website to develop their talking points. Attendees are generally more interested in talking about benefits than legislation. As noted in the FH-19, read your audience; listen and address their concerns. Often you will “sell” the Federal Benefits Institute as a resource for them to obtain needed information.

Presuming the health fair precedes the membership meeting and the reps are the program, once the meeting comes to order, introduce the reps who will provide a brief overview of their plans. When finished, they will depart for their next health fair. You may ask that they leave behind a few brochures for members unable to attend the health fair or meeting.

Have fun! This is an opportunity to meet new people and gain insight into their needs and challenges. It’s also a chance for your chapter to show its value to federal employees and retirees and build community awareness of NARFE.

## **Attending an Agency FEHB Plan Health Fair**

### **STEP 1 – Start Early!**

Begin planning early in the year! The health fair schedule is released in July so, if you wish to participate, you need to submit a request by the end of May. Requests are submitted to the FEHB plan rep who compiles the calendar; contact the federation outreach committee secretary for the rep's name and contact information.

Establish a lead person who will coordinate all of the following steps.

Before requesting to participate, determine the length of the event and whether or not you have enough people to staff your table for that amount of time.

Contact the federation outreach committee secretary to learn about federation 50% matching funds available for certain items, e.g., candy and gift cards.

### **STEP 2 – Gather Information**

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- Complete the online form, indicate the quantity of items you wish to order, and click "SUBMIT" at the bottom of the page

Review the other information available in this area of the website, especially the "Membership Officer Resources" where you'll find valuable recruiting tips and tools.

Study the FH-19 for ideas on how to set up a table and what supplies you'll need.

### **STEP 3 – Establish Your Team**

The size of your team will depend upon the length of the FEHB plan health fair you plan to attend. A short event could be staffed by one or two people. A longer event might best be

divided up into 2-3 hour blocks. If so, be sure you have solid commitment from enough people to staff the event.

For a longer event it's helpful to create a chart that shows who will staff the table at what time and include their cell phone numbers. Each staffer should have a copy of the chart so they can contact each other as necessary.

### **STEP 4 – Obtain Supplies**

Free NARFE Resources – Use the F-18 to order supplies listed in the FH-19. When ordering more than 100 *NARFE Magazines*, call the phone number indicated on the form to make arrangements. Everyone wants November magazines so be flexible and offer to split your shipment between two months, e.g., half September magazines and half October magazines.

Some chapters have ZAP displays; if yours doesn't, contact the federation outreach secretary who may be able to arrange for you to borrow one from a nearby chapter.

It's helpful to have a binder containing the FEHB plan premiums obtained from the OPM open season webpages. There are Fee for Service plans and HMO plans; there are also dental and vision plans. Having all that information handy in one place can be a useful tool for attendees who wish a quick comparison of rates. Be aware that, in some years, a plan's premium for "Self+1" can be higher than "Self and Family"; this is something attendees will appreciate knowing.



Chapter Purchased Resources – NARFE branded table cloths, banners and clothing are available for purchase.

To order a NARFE branded table cloth or clothing go to the NARFE General Store at <https://randdmarketing.four51ordercloud.com/NARFE/catalog>.

Banners need to use the NARFE-approved logo. Contact the federation outreach committee secretary for help with obtaining a print-quality design from the National office. You may then order the banner from an online company like Staples or VistaPrint.

Federation Provided Resources – NARFE branded table runners and pens can be requested from the federation outreach committee secretary. The federation may occasionally purchase other NARFE branded swag for chapter use so be sure to ask.



### **STEP 5 – Attending the Health Fair**

NARFE is invited to have a table at FEHB plan health fairs at federal facilities thanks to its good relationship with the carriers; remember, you are there as their guest. And, you represent NARFE so please dress and behave professionally. You can purchase NARFE logo clothing at the NARFE General Store.



Either the team lead or their designated staff should arrive early to set up your table and stay late to pack up. They will be tasked with transporting all the necessary supplies to and from the event.

All staffers need to strive to keep your area neat and clean throughout the event and, at the end of the day, be sure your area is as clean as you found it when you arrived. If the carriers provide for recycling of boxes, take advantage of that; if not, pack out your empty boxes.

Greet the FEHB plan reps, get acquainted, take their business cards. You may have an opportunity to host them at a chapter meeting or, if members have questions about their coverage, you can refer them to the rep.

Use what you learn from the FH-19 and the NARFE National website to develop your talking points. Attendees are generally more interested in talking about benefits than legislation. As noted in the FH-19, read your audience; listen and address their concerns. Often you will “sell” the Federal Benefits Institute as a resource for them to obtain needed information.

And have fun! This is an opportunity to meet new people and gain insight into their needs and challenges.

Attachment 1-3.1

**Determine a list of federal employers in each chapter's geographic area**

The federation outreach coordinator will research and maintain a list of all the Federal employers and job locations within the state, subdivide the list into sections assigned to each WSF chapter and provide the complete list to each chapter Outreach coordinator.

Product: A list of potential NARFE recruitment locations and organizations.

Attachment 1-3.2

**Identify recruitment opportunities associated with each employer (e.g., union meetings, professional association meetings, community events & local hangout spots)**

Each chapter outreach coordinator will review the potential NARFE recruitment locations and organizations list provided by the federation's outreach chairperson with the chapter officers. Collectively they will adjust the list by adding specific recruitment opportunities (such as local events and employee gathering places) based upon local knowledge and return a chapter endorsed list of recruiting opportunities to the federation outreach coordinator.

Product: Chapter endorsed list of potential NARFE recruitment events, locations and organizations.

### Attachment 1-3.3

## **Evaluate specific recruitment opportunities associated with each employer and rank order the resulting list.**

Working from the chapter endorsed list, the chapter officers will evaluate the feasibility and effectiveness of recruitment efforts at each potential target organization or event. Each chapter can develop their own set of evaluation criteria. As a starting point the following criteria are suggested:

- Number of potential members to be recruited;
- Anticipated level of interest by potential recruits;
- Opportunity to reach new member prior to retirement;
- Distance to be traveled;
- Ease of access to potential recruits;
- Availability of chapter members to support the recruitment effort; and
- Results of previous recruitment efforts.

The results of the evaluation should be included in the chapter endorsed list of potential NARFE recruitment events, locations and organizations.

The chapter outreach coordinator should then select at least 5 target recruitment opportunities for 2024 and 2025 and report the chapter's recruitment plans to the Federation outreach chairperson. Product: Evaluated chapter endorsed list of potential NARFE recruitment events, locations and organizations plus the chapter's 2024 & 2025 planned recruitment activities.

Attachment 1-3.4

## **Formally recruit at Federal Employers locations**

Formally recruit at Federal Employers locations or at other venues where local Federal employees are present as driven by evaluation in 1-3.3

### **Step 1 - Start Early!**

Begin planning early in the year! Make a schedule of all recruitment events for the year. Identify your points of contact for each recruitment activity. Contact the federation outreach chairperson if you need help and to learn about federation and national 50% matching funds available for certain items,.

Establish a lead person who will coordinate all of the following steps for each recruitment event.

Before making arrangements to participate, determine the length of the event and whether or not you have enough people to cover the event (e.g., staff your table, speak at the event, mingle with the potential recruits, set up and clean up)

### **STEP 2 – Gather Information**

Obtain a copy of the NARFE National FH-19 Member Marketing Manual publication from the National website. <https://www.narfe.org>

-Log in

-Under the “FOR MEMBERS” tab, click “Officer Resources”

-Select “All Forms By Form Number”

-Scroll down and select “FH-19 Member Marketing Manual” (note that this publication is outdated and includes images from the old NARFE website)

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Or, for a hard copy:

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-Under the “FOR MEMBERS” tab, click “Officer Resources”

-Select “F-18 Requisition for Printed Supplies”

-Complete the online form, indicate the quantity of items you wish to order, and click “SUBMIT” at the bottom of the page

Review the other information available in this area of the NARFE website, especially the “Membership Officer Resources” where you’ll find valuable recruiting tips and tools.

Study the FH-19 for ideas on how to set up a table and what supplies you’ll need.

### **STEP 3 – Establish Your Team**

The size of your team will depend upon the length of the recruitment event you plan to attend or host. A short event could be staffed by one or two people. A longer event might best be divided up into 2-3 hour blocks. If so, be sure you have solid commitment from enough people to staff the event.

For a longer event it's helpful to create a chart that shows who will staff the event in whatever role and at what time and include their cell phone numbers. Each staffer should have a copy of the chart so they can contact each other as necessary.

### **STEP 4 – Obtain Supplies**

Free NARFE Resources – Use the F-18 to order supplies listed in the FH-19. When ordering more than 100 NARFE Magazines, call the phone number indicated on the form to make arrangements. Everyone wants November magazines so be flexible and offer to split your shipment between two months, e.g., half September magazines and half October magazines.

Some chapters have ZAP displays; if yours doesn't, contact the federation outreach chairperson who may be able to arrange for you to borrow one from a nearby chapter.

Chapter Purchased Resources – NARFE branded tablecloths, banners and clothing are available for purchase.

To order a NARFE branded tablecloth or clothing go to the NARFE General Store at <https://randdmarketing.four51ordercloud.com/NARFE/catalog>.

Banners need to use the NARFE-approved logo. Contact the federation outreach committee secretary for help with obtaining a print-quality design from the National office. You may then order the banner from an online company like Staples or VistaPrint.

Federation Provided Resources – NARFE branded table runners and pens can be requested from the federation outreach chairperson. The federation may occasionally purchase other NARFE branded swag for chapter use so be sure to ask.

### **STEP 5 – Attend Each Recruitment Event**

You represent NARFE so please dress and behave professionally. You can purchase NARFE logo clothing at the NARFE General Store.

Either the team lead or their designated staff should prepare all needed supplies (e.g., tables, chairs, banners, handouts, candy, pens...) a sufficiently in advance.

Arrive early at the event to set up (Usually this involves transporting your marketing supplies but sometimes you also need to bring a table and chair(s).) and stay late to pack up.

All staffers need to strive to keep your area neat and clean throughout the event and, at the end of the day, be sure your area is as clean as you found it when you arrived.

Greet the event organizers (if you are not hosting the event) or all the event participants if you are hosting the event, get acquainted, take their business cards. You may have an opportunity to host them at a chapter meeting or follow up on a conversation.

Use what you learn from the FH-19 and the NARFE National website to develop your talking points. As noted in the FH-19, read your audience; listen and address their concerns. Often you will “sell” the Federal Benefits Institute as a resource for them to obtain needed information.

Hand out Membership Brochures (F-135) and collect contact information from interested prospects on the M-2 cards! Forward the contact information to NARFE National so they can be added to the prospect database.

And have fun! This is an opportunity to meet new people and gain insight into their needs and challenges.

Product: A short report (a simple 2-line e-mail perhaps with a picture or two) to the Outreach Chairperson describing the event and the number of new recruits.

## **Instructions on How to Reach Out to Current Members**

The purpose of this activity is to connect with members to find out how they are doing, if they need any help that we can provide and to verify that the information that NARFE has for them in the national database is correct and/or needs updating. We can also let them know what the chapter has been up to and what events are coming up. Hopefully we can engage them to be more involved in chapter activities and business.

### **STEP 1 – Retrieve a Chapter Member Roster listing Personal Individual Information (PII)**

A chapter officer will need to sign into NARFE National’s Association Management System (AMS) database to download a current chapter member roster. Be sure to print out all contact information for each member in the roster listing. Look at the sample “Telephone Script” document (attachment 1-4.1B) to make sure all the information about the member is listed on the roster. Only share the portion of the roster with the team members that will be making those contacts. The team will be handling personal sensitive information about the members, so the team members need to act appropriately and not share members PII with any other member. To learn how to access AMS and use it for updating member data and tutorials on running reports, sign into NARFE national, then on the address line go to <https://www.narfe.org/cab/> and/or go to <https://sites.google.com/view/narfecabweb/tutorials/ams>

### **STEP 2 - Select Your Team**

Depending on the number of members in your chapter to contact, select a group of members to reach out to and contact each member of the chapter. The team should be caring, communitive and friendly members that are willing to make connections with a variety of members (older, younger, fearful, isolated, etc.). Also, be aware that you might find that a member has passed away. The team members should be very familiar with NARFE’s mission and details about the chapter (officers, meetings, etc.).

### **STEP 3 – Assign Members to Each Team Member**

Divide your chapter member roster evenly between your team of contactors. Example: John calls members with last names starting with A-J, Nancy calls members with last names starting with K-Q, and so on depending on number of callers and number of members. Format a spreadsheet with only the members and their information that each team member will be contacting.

### **STEP 4 – Contact Current Members by Phone**

Edit/modify sample Telephone Script document (attachment 1-4.1B) to fit your specific chapter and current events. Start with phone calling using a sheet of Telephone Script for each contacted member. Use the roster of members that are assigned to you and make notes of when contacted, if you left a voice message, phone disconnected/no longer in service, etc. If you must leave a voice message, leave your name and phone number for them to call you back. If you do not reach the member, try calling again on a different day and/or time.

### **STEP 5 – Contact Current Members by Email**

For those members that you were not able to reach by phone calling, send a short email to them if they have an email address on file with NARFE. Use the sample Email to Members (attachment 1-4.1C)

### **STEP 6 – Contact Current Members by USPS Mail**

If within 2-4 weeks of trying to contact a member by phone or email unsuccessfully, send them a letter through the USPS. Write a personal letter to the member by editing/modifying sample USPS Member Letter (attachment 1-4.1D). Complete the letter with the member's own personal information that NARFE has in the database for them and ask them to verify that it is correct. Send a self-addressed return envelope with the letter, so that all they have to do is make any corrections to their personal information, stick it in the envelope, add a postage stamp and mail it back to the lead team member.

### **STEP 7 – Update NARFE's AMS Database**

When you contact members, it can be explained to them that they can update their own personal information with NARFE. In many cases though, the members would like the chapter to notify national membership to update their contact information. Usually, the Membership Chair can make member updates in the AMS database. Members or Chapter Officers can make updates to the membership database by calling NARFE Membership at 1-800-456-8410, Press 1 for Membership and Dues Payments or by sending an email to [memberrecords@narfe.org](mailto:memberrecords@narfe.org). Make sure you check the database within a couple of weeks of making an update to make sure the update went through. To learn how to access and make updates in AMS, look at Step 1 above.

### **STEP 8 – Complete and Finalize Outreach Activity**

Complete any follow-up on any requests from members. Reach out again to those members which expressed interest in becoming more active in the chapter, especially those that expressed interest in becoming an officer or chairperson, editor, etc. Create a file for the outreach and contact files/documents. Either the Membership Chair or Service Officer should hold on to these records.

**Congratulations on your Outreach Efforts and for helping to clean up our National AMS database!!! We're sure you've made some wonderful new connections!!!**

### Telephone Script and Questions During Phone Call to NARFE Members

Hello \_\_\_\_\_ (member's name) this is \_\_\_\_\_ (your name) from your local NARFE chapter 196. We are reaching out to our members to find out how they are doing, verifying contact information and finding out if there is anything that we can do to help you during this crazy time.

How are you doing and is there anything that we can do to help you out?

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We will probably not be having our in-person meeting and Health Fair this coming October. Would you be interested in joining in on an online webinar or chat session with specific Healthcare Providers? \_\_\_\_\_ What Health Insurance Provider do you currently have? \_\_\_\_\_ Are you only interested in them? \_\_\_\_\_ Would you like to attend an in-person Health Fair at a local agency site? \_\_\_\_\_

May I verify your personal contact information so that we can make sure that we have your correct information in the National database? (When verifying personal information, we need to tell them what is in the database and ask if this is correct. Members may be fearful of giving personal information out if we don't let them know what we have already.)

1. Is your best contact phone number \_\_\_\_\_?

Do you have a 2<sup>nd</sup> # \_\_\_\_\_?

2. Is your correct email \_\_\_\_\_?

3. Is your correct US mailing address \_\_\_\_\_?

4. Do you have a spouse or partner that is still living? \_\_\_\_\_

Are they a NARFE member? \_\_\_\_\_

5. Would you like to share your emergency contact person with us? What is their name and contact phone number? \_\_\_\_\_

6. How would you best like to get information and correspondence from us like newsletters (generally 6-8 per year)? Email \_\_\_\_\_ or US mail \_\_\_\_\_. (Only about 50% of emails we send out are looked at.)

7. Would you like the phone number of a Chapter Officer who lives in your area? \_\_\_\_\_

---

8. Are you interested in becoming more involved in our local chapter? \_\_\_\_\_. Would you consider becoming an Officer or Chairperson? \_\_\_\_\_. We need a newsletter editor, and our president and treasurer positions could be opening up soon. \_\_\_\_\_

---

Do you have any other questions or concerns that you would like to address? \_\_\_\_\_

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Refer to "Covid-19" message sent out by Steven Roy from Charles Caughlan for helpful Resources, References and website links, Dated June 8, August 6 2020 or <https://www.narfe.org/legislation/?fa=viewArticle&id=4752#OtherFedGuide>

**Additional things to discuss:**

Use caution when stating Joined Dates because if a member dropped for non-renewal and later renewed, the Joined Date is set with the renewed date at times (example: Kathy K. originally joined in January 2005, but now shows June 2019). Also Joined Dates reflect National Membership, not Chapter Membership.

I see you Joined NARFE on \_\_\_\_\_. And your Membership Category is:

Life \_\_ Dues Withholding Monthly \_\_\_\_\_ One Year \_\_ Two Year \_\_ Three Year \_\_\_\_\_

It looks like your Membership will Expire on \_\_\_\_\_ since you are not a Life Member or have Dues Withholding. The benefit to having Dues Withholding is that you do not need to remember to renew, and you can get up to 15% discount on your National Membership. You can call National at 1-800-456-8410 to set up Dues Withholding.

Are you still an Active Employee of the Federal Government, Retiree or Survivor Annuitant (select only one to ask)?

**Be sure to thank the members for talking with you. We certainly hope it was a good connection. Thank you!!!**

1-4.1.C

## Sample email to current members

Subject: NARFE Calling to Update Information

Merry Byrum [merrybemerry@gmail.com](mailto:merrybemerry@gmail.com)

Mon, Sep 28, 2020 at 3:23 PM

To: charliebrown@earthlink.net

Dear Charlie,

Your local Chapter 193 leadership team is trying to reach out to all our members.

Hopefully you received the latest Chapter 193 newsletter in the USPS mail the first week of September advising you to expect a courtesy call from one of your chapter members. The purpose of the call is two-fold... (1) to see how you're doing during this crazy time and (2) to verify that the contact information we have on file for you at NARFE national is correct.

The phone number, (360) 676-7138, we have for you has been disconnected or no longer in service. Please respond either by return email letting me know what your correct phone # is or call me on my phone at (360) 202-8999. Many thanks.

I look forward to hearing from you. Hope you're doing well and staying safe!

*Merry Byrum*

Service Officer & Retention w / WSF Outreach Committee  
Everett Chapter 0193, previous Officer of Northwest Cascades Chapter 0196  
National Active and Retired Federal Employees Association - NARFE  
[\(360\) 202-8999](tel:(360)202-8999)  
[merrybemerry@gmail.com](mailto:merrybemerry@gmail.com)  
<https://www.narfewa.org/>  
<https://www.narfe.org/>  
(800) 456-8410



FEDERAL BENEFITS EXPERTS

**National Active and Retired Federal Employees Association**  
**Everett Chapter, Washington State Chapter # 0193**

1-4.1.D **Sample Letter to Follow Up with Members Not Reached by Phone**



**National Active and Retired Federal Employees Association  
Everett Chapter, Washington State Chapter # 0193**

Dear NARFE Member,

Date

Your local chapter 196 leadership team is trying to reach out to all our members to find out how they are doing and their interest in chapter and national NARFE membership. We are verifying member contact information to update the National database and finding out if there is anything that we can do to help you during this crazy time.

You are getting this letter because during our outreach to members this past September and October, we were unable to connect with you through the phone number that we have on file for you. We are hoping that you will get back to us so that we know that you are doing OK. We are here to offer help, if you need it.

Please verify that this information is correct for you. **Make corrections where needed and mail back in the enclosed self-addressed envelope.** If you would prefer to call us to update your information, please call our Service Officer, Merry Byrum at (360) 202-8999. If you get her voicemail, it is safe to leave a message so she can call you back.

Member Name: Charlie Brown

NARFE ID: 10786567

Address:

P O Box 1018, Sedro Woolley, WA, 98284

Primary Phone #:

(360) 856-1000

2<sup>nd</sup> Phone #:

Email:

Emergency Contact:

Membership Category:

Active Employee on 3 year renewal

Membership Expires:

02/28/2023

If you have any concerns and interests in chapter membership that you want to share, you may do that here or attach an additional sheet of paper.

Sincerely,  
The Officers and Leadership Team of Everett Chapter  
(360) 202-8999, [MerryBeMerry@gmail.com](mailto:MerryBeMerry@gmail.com)

~~ **NARFE CHAPTERS – YOUR LOCAL CONNECTION** ~~

> **Call or logon to Join or Re-new your Chapter Membership.** Chapter 193 dues are \$10/year. Call 1-800-456-8410 and Press #1 for “Membership and Dues Payments” or online, enter <https://www.narfe.org> and select “Join Now” or “Renew Now”. Dues withholding Option is a nice automatic way to pay your dues.

> **Have You Changed Your Mailing Address, Phone # or E-mail Address?**

Be sure to update your information at NARFE National so that you will continue to get important information. Call 1-800-456-8410 or logon to <https://www.narfe.org/> Contact your local chapter by calling Merry at (360) 202-8999

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***NOTE: Senators and Representatives do not have direct e-mail accounts. Log into the web site listed below and follow “Contact” directions to send them your message.***

**Senator Patty Murray (D) - 2930 Wetmore Avenue, Suite 903  
Everett, WA 98201 - 425-259-6515, [www.murray.senate.gov](http://www.murray.senate.gov)**

**Senator Maria Cantwell (D) - 2930 Wetmore Avenue, Suite 9B  
Everett, WA 98201 - 425-303-0114, [www.cantwell.senate.gov](http://www.cantwell.senate.gov)**

**Rep. Suzan DelBene (D) – (District 1) - 450 Central Way, Suite 3100,  
Kirkland, WA 98033 425-485-0085, <https://delbene.house.gov>**

**Rep. Rick Larsen (D) – (District 2) - 2930 Wetmore Avenue, Suite 9F  
Everett, WA 98201 - 800-562-1385 or 425-252-3188, <https://larsen.house.gov>**

**Rep. Kim Schrier (D) – (District 8) - 1445 NW Mall Street Suite 4  
Issaquah, WA 98027 – 425-657-1001, <https://schrier.house.gov>**



FEDERAL BENEFITS EXPERTS

National Active and Retired Federal Employees Association  
Everett Chapter, Washington State Chapter # 0193

## WELCOME to NARFE and to CHAPTER 193!

If you are a current federal employee, a retired federal employee or the spouse of a federal employee, NARFE represents you in Washington DC. We present to Congress your concerns about pay, employment, retirement and your earned benefits.

NARFE was founded in 1921 by federal workers and has become the most highly respected legislative voice for active and retired federal employees. Now, with nearly 137,000 members nationwide, we are a **major force on Capitol Hill** and across the nation.

NARFE is not a union but rather a grassroots advocacy association. Although NARFE is political, it is non-partisan and committed to securing the future that federal employees have worked hard to achieve for ourselves and our families. Remember... *the laws governing federal employees and retirees can and do change...* but each member's voice added to thousands of other concerned voices carries weight with Congress and helps to protect your hard earned benefits.

The **Everett Chapter 193** members and **NARFE National** members living in our area are almost 350 members strong in Whatcom, Skagit, Island, San Juan and most of Snohomish counties. We meet the third Wednesday of every month, except June, July and August, for lunch at 11:30 AM and then proceed into our business meeting at 12:30 PM. You can also connect to our meetings via Zoom if you can't make it in-person. The Zoom starts at 12:30 and the link is below. Each month we meet we try to have an interesting program. We also have an Annual Summer Picnic and invite our U.S. House of Representatives and Senators to attend.

### Meetings:

**When:** Third Wednesday of each month, except June, July and August at 11:30 AM

**Where:** Evergreen Bowling Lanes, 5111 Claremont Way, Everett, WA 98203

### Zoom:

<https://us02web.zoom.us/j/84885646379?pwd=YW1XbHdDR0NsV2VMY2hCenhvM1NvZz09>

**Or connect via phone:** (253) 215-8782, ID #: 848 8564 6379, Passcode: 545185

When it's time to re-new your membership (National annual dues \$48 and Chapter 193 annual dues \$10) here are your options. After 1<sup>st</sup> year membership you could get 15% off dues. If you are a Retiree, Spouse of Retiree or Annuitant Survivor, you are eligible for dues withholding automatically from your OPM monthly annuity. It's easy, painless and no need to remember to make payments after signing up for automatic deduction:

**Call:** 1-800-456-8410, Press 1 for Membership and Dues Payments

**Online:** <https://www.narfe.org> Select: RENEW NOW

If you change your physical address, email or phone number, please update your information by calling NARFE or signing in online to make the updates yourself.

Contact information for our chapter's Leadership Team is on the reverse side of this letter. Please contact any of them if you have questions or need more information. Whether you're happy contributing to the NARFE mission by just being a member, or by also participating actively in chapter and regional activities, Welcome!

***(Please See Next Page)***

- Chapter President: *Jim Carr* - 360 384-4262 - [diamonddilms@yahoo.com](mailto:diamonddilms@yahoo.com)
- Chapter Vice President: *Marvin Weiss* – 206-330-1057 – [maw1941X@gmail.com](mailto:maw1941X@gmail.com)
- Chapter Secretary: *Pat Rudd* - 425 418-2528 - [scarp@frontier.com](mailto:scarp@frontier.com)
- Chapter Treasurer: *Linda Cline* - 360 384-4262 - [diamonddilms@yahoo.com](mailto:diamonddilms@yahoo.com)
- Chapter Service Officer: *Merry Byrum* - 360 202-8999 - [merrybemerry@gmail.com](mailto:merrybemerry@gmail.com)
- Chapter Membership Chair: *Katherine Williams* - 425 330-5710 – [yntwa@gmail.com](mailto:yntwa@gmail.com)
- Chapter Sunshine Chair: *Pat Rudd* – 425 418-2528 – [scarp@frontier.com](mailto:scarp@frontier.com)
- Chapter Alzheimer’s Chair: *Marvin Weiss* - 206-330-1057 – [maw1941x@gmail.com](mailto:maw1941x@gmail.com)
- Chapter Legislative Chair: *Steven Roy* - 425 344-3926 - [stevenroy1@yahoo.com](mailto:stevenroy1@yahoo.com)
- Chapter Political Action Committee (PAC) Chair: *Steven Roy* - 425 344-3926 - [stevenroy1@yahoo.com](mailto:stevenroy1@yahoo.com)
- Chapter Newsletter Editor: Volunteer Opportunity (please join our team)

. NARFE National web site: [www.narfe.org](http://www.narfe.org) or call 1 800 456-8410  
 . NARFE Washington State Federation web site: [www.narfewa.org](http://www.narfewa.org)

Again, **WELCOME** to the Everett Chapter 193. We hope you will join us working to protect the earned benefits of active and retired federal employees.

Sincerely,  
*The Team at Everett Chapter 193*



**NOTE: Senators and Representatives do not have direct e-mail accounts. Log into the web site listed below and follow “Contact” directions to send them your message.**

**Senator Patty Murray (D) - 2930 Wetmore Avenue, Suite 903  
 Everett, WA 98201 - 425-259-6515, [www.murray.senate.gov](http://www.murray.senate.gov)**

**Senator Maria Cantwell (D) - 2930 Wetmore Avenue, Suite 9B  
 Everett, WA 98201 - 425-303-0114, [www.cantwell.senate.gov](http://www.cantwell.senate.gov)**

**Rep. Suzan DelBene (D) – (District 1) - 450 Central Way, Suite 3100,  
 Kirkland, WA 98033 425-485-0085, <https://delbene.house.gov>**

**Rep. Rick Larsen (D) – (District 2) - 2930 Wetmore Avenue, Suite 9F  
 Everett, WA 98201 - 800-562-1385 or 425-252-3188, <https://larsen.house.gov>**

**Rep. Kim Schrier (D) – (District 8) - 1445 NW Mall Street Suite 4  
 Issaquah, WA 98027 – 425-657-1001, <https://schrier.house.gov>**

Attachment 1-4.1F **Procedures to Update AMS member info Database**

<https://www.narfe.org/cab/tutorials>

Additional CAB Tutorials can be found at:

<https://sites.google.com/view/narfecabweb/tutorials>.

1-4.2.

## **FH-19 Membership Marketing Manual**

<https://www.narfe.org/wp-content/uploads/2020/12/fh-19-pdf.pdf>

Additional resources can be found at <https://www.narfe.org/officer-resources/membership-officer-resources/narfe-membership-recruitment-resources/>

Attachment 1-4.3.

### **Developing Your Chapter List of Publications for Outreach**

(Examples: Event flyers, local newspapers, local online news sources, senior centers, employee bulletin boards)

Attachment 2 & 3

| <b>Strategy Goal 2: STRENGTHEN &amp; FOCUS CHAPTER OPERATIONS (Delayed until 2025)</b>                         |                                                                                                                |                |                  |                  |             |
|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------|------------------|------------------|-------------|
| <b>Specific &amp; Strategic</b>                                                                                | <b>Measurable</b>                                                                                              | <b>Aligned</b> | <b>Realistic</b> | <b>Timeframe</b> | <b>Rank</b> |
| - Assess member motivation and needs.                                                                          | Review minutes of focused discussion group and individuals. Tabulate the results and review at Chapter meeting |                |                  |                  | 4,2         |
| -- Develop a common understanding of National vs Chapter members. How do we best employ and serve both?        |                                                                                                                |                |                  |                  |             |
| -- Develop a common understanding of Active vs Retired members. How do we best employ and serve both?          |                                                                                                                |                |                  |                  |             |
| - Align chapter operations to chapter member needs (i.e., individual chapters can have very different focuses) |                                                                                                                |                |                  |                  |             |
| --                                                                                                             |                                                                                                                |                |                  |                  |             |
|                                                                                                                |                                                                                                                |                |                  |                  |             |

On Hold until 2025

| <b>Strategy Goal 3: STRENGTHEN &amp; FOCUS FEDERATION OPERATIONS</b>                                                                                 |            |         |           |           |      |
|------------------------------------------------------------------------------------------------------------------------------------------------------|------------|---------|-----------|-----------|------|
| Specific & Strategic                                                                                                                                 | Measurable | Aligned | Realistic | Timeframe | Rank |
| -4-1 Clearly assign specific Congregational advocacy leadership/support roles to chapters of Federation based upon geography, capability & interests |            |         |           |           | 5,1  |
| - Assign specific recruitment areas of responsibility and identify specific recruitment target groups for each chapter.                              |            |         |           |           |      |
| - Provide training and assistance to help chapters target outreach                                                                                   |            |         |           |           |      |

Delegated to Doug Rushton to work as the Legislative Chair

On Hold until 2025