

Last revised: May 10, 2014

A Membership Strategic Plan simply includes:

- *Your Goals for Membership*
- *How You Intend to Achieve Those Goals*
- *How You Will Know If You Are Succeeding*

Your plan can be as general or as detailed as you wish. The following goals – and possible means of achieving those goals – are simply ideas. Your plan should be tailored to YOUR Chapter and to YOU. Reviewing the Monthly Stats for your Chapter will help highlight which area would be most beneficial for you to focus on – identifying and signing up new members, converting prospects ID'd by HQ into members, or gaining back members who did not renew.

For example, my own Chapter is in a rural area. We get very few Prospects ID'd by HQ, and we have no source of Active workers in our territory. So my Chapter must find our own prospective members. We also have a severe Retention issue. So my plan for Chapter 1823 emphasizes both recruiting new members and retaining current members.

Also - you might wish to include only a few actions to achieve each Goal you specify, to avoid being overwhelmed.

All “Refer to” materials described below can be found at www.vanarfe.org in the Membership area. Please contact me if you need help or ideas for your strategic plan.

IDEAS FOR CHAPTER MEMBERSHIP STRATEGIC PLAN - 2014

Goal: Add New Members Equal to x% of Membership

POSSIBLE TACTICS/ACTIONS TO ACHIEVE THIS GOAL

- Provide Online means for potential members to find my Chapter**
 - Make sure my Chapter's webpage at www.VANARFE.org would entice someone to find out more about us (include photos, info on past programs/ upcoming programs and non-meeting activities, etc.)
 - Make sure my Chapter's webpage has updated, valid contact information.
 - Create a Facebook or similar page for our Chapter,
- Train Chapter members in keeping Eyes & Ears Open** – to identify who is a Federal worker, retiree, or spouse.
 - *Refer Members to “Recruitment Training Examples from Past Brainstorming” for ideas on publications to scan for potential NARFE members. See also “Recruitment Ideas”.*
 - Assign specific members to scan community newspapers and various free publications for potential NARFE Members – specifically for articles about upcoming speakers,

project leaders, or business owners - that often mention whether someone was/is a Federal employee.

Train/Role play with Chapter members in use of the Elevator Speech – to explain NARFE and its benefits to prospective members that they encounter at plays, sports events, airports, conventions of non-NARFE groups, etc.

- Elevator Speech is available at: <http://www.narfe.org/oam/articles.cfm?id=3275> (Once you've logged in as a NARFE member)
- Emphasize: NARFE acts as our advocate before Congress, provides info on latest actions of Administration and Congress, help answering benefits questions, and also raises funds for Alzheimer's Research.
- Emphasize: NARFE is NOT a union.

Search Facebook, LinkedIn and other social media - for profiles mentioning Federal employment

- Ask specific Chapter members to search for employees at their former agencies

Attract more people to meetings.

- Schedule some programs on non-traditional topics.
- Schedule some meetings as tours of local hospitals, theaters, etc.
- Informally survey Chapter members to learn what new and interesting projects Federal agencies are doing. Ask someone involved in any such project to speak at a meeting.
- If in a rural area, look into whether such person could speak via Skype at a Chapter meeting.
- Hold more luncheon meetings.
- Refer to *“Recruitment Ideas”* or *“Recruitment Training Examples from Past Brainstorming”* for specific ideas.

Attract newer retirees and those still working.

- Schedule non-meeting activities (e.g., hikes, bike rides, kayaking, fishing trips; attendance at plays, ball games, community events etc.)

Work with the PR Chair to publicize meetings and non-meeting activities.

- Distribute meeting flyers via email to members - and ask them to post them.
- Refer Members to *“Recruitment Training Examples from Past Brainstorming”* for ideas on where to post flyers.
- Refer to *“Recruitment Ideas”* for more suggestions on publicizing meetings.

Work with the PR Chair to make NARFE in general and my Chapter known in my community.

- ID opportunities to have a booth - at local festivals, health fairs, Senior Days, etc – or participate in parades.
- Get Chapter members to volunteer to walk around during the Public Service annual event on the Mall - with recruitment materials.
- In fundraisers for, e.g., PBS, NPR, etc. – issue a challenge to other NARFE/Chapter members in the area.
- Participate as a Chapter/sign up as a team for charity-related activities.
- Contact the President of those organizations likely to have active/retired Federal employees, or spouses thereof, as members and ask to speak to the organization.

- Write op-eds or letters to the editor (especially in rural areas).
- Ask Chapter members to participate in Career Day at local schools.
- Refer to “Recruitment Ideas” or “Recruitment Training Examples from Past Brainstorming” for specific ideas.

ID places to leave NARFE magazines – and enlist Chapter members in distributing them.

- Ask - in newsletter and at meetings - for dual member families to bring in their extra magazines.
- Ask HQ to send me 5 extra magazines each month.
- Refer to “Recruitment Ideas” or “Recruitment Training Examples from Past Brainstorming” for specific location ideas.

Create a Facebook or other Social Media page for my Chapter

- Ask Chapter members to mention their NARFE activities in their Facebook/other Social Media pages.

Give Chapter members packets (get plastic bags from Gaston Gianni, VFC Public Relations Chair) - to hand out to prospective members they identify.

- Refer to “Recruitment-Retention Materials” for details on what materials to include.

Make sure to check the local Chapter option on all application forms, and fill in your Chapter #. Remind Chapter members to fill in their NARFE membership number as the Recruiter.

Encourage current members to give Gift Memberships – to their children or grandchildren - or to friends.

Goal: Contact x% of Prospects ID'd by HQ - AND Convert x% of Prospects to Actual Members

POSSIBLE TACTICS/ACTIONS TO ACHIEVE THIS GOAL

In addition to any of the actions detailed above under the Goal to Add New Members:

- Invite Prospects to a Chapter meeting**
- Discuss benefits of joining NARFE – (e.g., Advocate before Congress, info on latest actions of Administration and Congress, help on answering benefits questions, raising funds for Alzheimer’s Research.)**
- Discuss GEMS and Newswatch emails - and reassure them that NARFE does NOT sell or rent their email addresses.**
- Refer them to Chapter webpage or Facebook site, etc.**
- Ask to mail/email them more info:**
 - Materials in Packet discussed above - except for magazine.
 - Refer them to www.narfe.org for access to current NARFE magazine.
 - www.narfe.org/home/articles.cfm?ID=2792
 - Sample GEMS/News Watch

Goal: Increase Renewal Rate from x% to y%

POSSIBLE TACTICS/ACTIONS TO ACHIEVE THIS GOAL

- Focus on converting the 6 month free memberships to paid members.**
 - ID who is a 6 mo free member –
 - In the OAM, click on the New Members button. Fill in the time period 10-1-2013 to 12-31-2013. AND choose to sort by Join Date -- and be sure to include Expiration Date in the info returned.
 - Scan the resulting list for people who signed up in the Oct, Nov and early Dec time period - AND whose Expiration Dates are Mar, April, May, June 2014.
 - Call these members - to discuss benefits of belonging to NARFE.
 - Make sure they are aware of NARFE's Legislative Accomplishments (see www.narfe.org)

- Make new members feel welcome**
 - Mail/email a welcome letter to all new members
 - Enlist help in calling each new member to invite them to a meeting
 - Assign a host/hostess for each meeting - to greet newcomers and introduce them to others.

- Urge current members to sign up for Dues Withholding or Lifetime Membership.**
 - Write articles/reminders in Chapter newsletter.
 - Bring Dues Withholding brochures and applications to Chapter meetings.

- Urge current members to sign up for GEMS and Newswatch**
 - Bring sample GEMS emails and Newswatch emails to Chapter meetings.
 - Offer to forward sample GEMS and Newswatch emails to persons not signed up.
 - Bring a laptop or tablet to Chapter meetings and sign people up for GEMS and Newswatch at meetings.

- Call members sent 2nd Notice to discuss benefits of belonging to NARFE:**
 - Ask specific Chapter members to help in making calls/sending info to non-renews.
 - NARFE is your voice before Congress to protect your already earned benefits. (For example, successfully urging Congress not to change the COLA formula/adopt the Chained-CPI.
 - NARFE provides timely information about what the Administration and Congress are proposing/doing (via magazine, GEMS, Newswatch).
 - Access to expert help on any questions you might have re your Federal benefits.
 - Ask if they have any issues/questions about their benefits?

 - Ask if they are signed up for Gems and Newswatch. If not, offer to forward sample email messages to them; reassure that NARFE **DOES NOT rent or sell ANY personal information.**

- Call/ email members dropped for non-renewal - within the same month that they were dropped.**
 - Ask specific Chapter members to help in making calls/sending info to non-renews.

- If they just forgot, discuss the Dues Withholding option
 - Also mail them a reinstatement form, a Dues Withholding brochure and form, and possibly a 2013 Legislative Accomplishments printout and the “Narfe is a Pension Bargain” letter.
 - Refer to “Recruitment-Retention Materials”, posted at www.vanarfe.org for more information on what to mail out.
- Be sure to fill in their Member ID and your Chapter # on all forms.*

For Non-renews or 2nd Notice persons hesitant to renew or who aren’t sure what NARFE does for them, ask to mail/email them more information, including:

- NARFE is a Pension Bargain Ltr to the Editor
- NARFE 2013 Legislative Accomplishments
- Press release on non-adoption of Chained-CPI. (Available at www.vanarfe.org in Membership area)
- Sample GEMS and NewsWatch

- Call Non-Renews AFTER they have received the materials.

If they are absolutely opposed to rejoining the local Chapter, perhaps because they have no interest in attending meetings, suggest the eChapter – and send them a Reinstatement form with the eChapter listed AND an F-84 Chapter Transfer form, available at <http://www.narfe.org/pdf/f-84.pdf>.

Goal: Increase Dues Withholding by x# of Members

POSSIBLE TACTICS/ACTIONS TO ACHIEVE THIS GOAL

- Bring up Dues Withholding - with its 15% savings on national dues – in Chapter newsletters and at meetings.
- Include a Dues Withholding Brochure and the DW-3 Dues Withholding application in materials given to new prospects who are retired.
- Include a Dues Withholding Brochure and the DW-2 Dues Withholding application in materials sent to non-renews.

Goal: Add x# of Current Workers as Members

POSSIBLE TACTICS/ACTIONS TO ACHIEVE THIS GOAL

In addition to any of the actions detailed above under the Goal to Add New Members:

- Use President Joe Beaudoin’s Introductory Letter for Federal Buildings**
http://www.narfe.org/pdf/Federal_Buildings_Intro_Letter.pdf
- Invite speakers for Chapter meetings from Federal agencies.** (This may also help build relations with an agency.)
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Enlist Chapter members who are current Federal workers to recruit at their agencies, and retirees to recruit at their former agencies.

- Ask retirees to take brochures/printouts with them when they visit their old office.
- Ask current workers and retirees to leave extra copies of magazine - with a label with contact info for my Chapter – in coffee/lunch areas at their current or former work places.
- Ask all members to contact at least 5 active workers at their former place of business or otherwise.
- Ask current Federal employees to keep the NARFE magazine on their desks, and possibly a few brochures/applications.
- Ask current Federal employees to post flyers on Chapter activities on their doors or in their work space (if permitted).

Enlist retirees and current Federal workers to:

- forward interesting GEMS or Newswatch emails to prospective active workers.
- email various White Papers to prospective active workers.
 - *Refer to “Recruitment-Retention Materials” for links to “How Much Money Do You Need to Retire”, “FAQs About Your Federal Benefits”, and “Speeding the Retirement Journey”*

Encourage members to attend Retirement Parties of colleagues they know, and present them with a “Recognition” from NARFE - and perhaps a rose or something. The presenter should, of course, mention that NARFE advocates on behalf of active and retired Federal workers and provides helpful info on benefits and other questions about Federal retirement.

The presenter can also give the new retiree a magazine and a packet of other materials.

Enlist retired Chapter members to attend Conferences and Workshops open to the public at their former agencies – and chat with other attendees who may be current employees of the sponsoring agency.

In talking about NARFE with current Federal employees, in addition to the benefits of joining NARFE mentioned previously, **emphasize that “NARFE is a part of your preparation for retirement.”**

Refer to “Recruitment Ideas” for more suggestions.

Goal: Assess Progress by Reviewing Membership Stats Monthly

- Check the Stats for **New Members recruited.**
- Check the Stats for **% of Prospects ID’d by HQ that have been converted to Chapter members.**
- Check the Stats for **% of Non-renews that are Reinstated.**