



## **MEMBERSHIP RETENTION**

### **WHAT IS IT??**

Retention is our ability to keep our volunteers! Volunteers are the folks who keep NARFE alive and working. They take on all kinds of roles within the organization, and give many, many unpaid hours to support NARFE and its operation. They are, indeed, the life blood of NARFE! So how do we ensure our volunteers stay involved with NARFE and, most importantly, how do we ensure that we create a volunteer-friendly environment that will help us retain these volunteers for the long term? In short, we do this by creating a climate that welcomes them and encourages their efforts. We do this by enabling them to use their valuable skills to make a positive contribution to NARFE. And we do this by ensuring their experience being part of the NARFE organization is nothing short of exciting – and if not exciting – at least ensuring that it is satisfying and worthwhile. For these reasons, retention starts the day a member is recruited! Pure & simple, it is The Art of Making All Welcome!

### **WHAT IS THE PROBLEM??**

As FLFED Federation 1st Vice President with membership oversight, I tracked membership losses by membership number over a two-year span. I was able to determine in that time span that 56.5% of our losses were members with THREE or less years of membership. "Exit" interviews bore out that one of the prime reasons for dropping out was they were NOT welcomed when they attended meetings; they were never contacted after attending a meeting; and no one showed any interest in them. NARFE, at the Chapter level, generally, has no real welcome mat for the new!

This is not new! You know this! But aside from knowing this and acknowledging the problem, it persists and it is killing us!

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## **NARFE's TARGET OF RETENTION!!**

While there is still a relatively high influx of CSRS Retirees, greater numbers of AFE's recruited are FERS and these newcomers are part of what is known as the "Baby Boomers!"

## **WHO IS THE BABY BOOMER??**

According to a Seattle Times (2/22/05) article, this "Baby Boomer" generation makes up a 1/3 +/- of the work force, filling many of the most skilled and senior jobs. And, with their near workaholic habits, they are among the most aggressive, creative and demanding workers in the market. They will remain employed longer and have their own priorities for their spare time. (About.com). And they do not want to waste their "spare time." Therefore we must be relevant.

## **MAKING NARFE RELEVANT!!**

Immediately, we realize that we MUST use a different approach not only to keep these members, but also in how we go about recruiting the Baby Boomer! The book, "**Civic Engagement and the Baby Boomer Generation: Research, Policy, and Practice Perspectives,**" by Sharon Simson and Laura Wilson, available on Amazon.com discusses the life styles and work ethics of the Baby Boomers (BBs). Whether still employed, or retired and embarking on a second career, today's Baby Boomer is in the peak years of product and service consumption They are highly individualistic and take issue with being labeled "conventional!" They cannot be lumped together and stereotyped! At a chapter meeting I attended, AFE/FERS said "BBs are the sound bite generation!" KISS - - Keep It Simple, Stupid!

Today, NARFE's sales pitch is based on one size fits all -- wordy and verbose! We package what we use to promote the values of NARFE basically towards us "traditionalists" - primarily in CSRS. We have been slow to push FERS issues until just recently. WEP/GPO, and Premium Conversion have been around a long time, but are still just that, goals.

Baby Boomers, with some time to spare while still employed either full time or part time, are interested in a wide variety of activities and clubs and we are competing for this leisure time. They're into health clubs, running, senior marathons, art classes, educational, spiritual tours, green tours, etc. They enjoy being challenged and they want to be involved in the process! BB are not a homogeneous group! They are individuals, ethnically and economically diverse! They are revolutionizing habits, behavior and tastes

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of people in their middle and senior years! They are even challenging the aging process staying intellectually and physically active!

### **WHAT'S THE BOOMER PSYCHE??**

What are the emerging needs of this generation and how can NARFE meet these needs? Even though they have served in the same government we served in, their experiences **have** been totally different! Computers and the accompanying technology was just beginning when we, certainly in my case, retired! Those of us who were supervisors had secretaries. In my agency, personal computers were introduced in the mid 1980's, but they were really no more than glorified typewriters. When BBs came into government, their generation began working with computers and with them it was and is a way of life.

Technology allowed downsizing and each person produced their own reports, maintained their own files and serviced their own needs! Technology has had a great impact on BB's! It not only transformed their work environment, it transformed their social life, time and money management, how to deal with stress, grief, illness, education, day-to-day needs and, for NARFE, how they connect with other people! See **"How to Profit in the New Boomer Marketplace"**, By Mary Furlong, 2007". She provides excellent insights into BBs and volunteerism!

### **BABY BOOMER "PSYCHE" OF VOLUNTEERISM!**

BB are less likely to volunteer out of a sense of duty or obligation as their parents did, but more likely to volunteer as part of social interaction. This does not mean they want to sit around feeding their face, talking about their latest visit to their doctor or dentist or about someone else's grandkids. They want to meet people with similar interests and with whom they can do other things! The biggest, single inducement for BBs to volunteer is being asked by someone in NARFE with whom they have established a relationship! With Mary Furlong's insights an appeal to BB's to volunteer is to recognize them as NARFE's future! They can leave an incredible legacy for NARFE through service as an active Committee member, Chapter, District or Federation officer. BBs are involved citizens, eager to help, willing to make suggestions and, for our own survival, should be included in the activities and planning at all levels in our Assoc.! The average volunteer usually supports only one organization at a time. However, BBs are more likely to volunteer for more than one org. We, thus, are competing for their time and this is where NARFE must show it's RELEVANCE! We must show that we are well organized, well informed and professional in running our business! BBs WILL NOT tolerate disorganization or sloppiness. They come from a results-oriented culture and know what works.

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## **RETENTION AND TRAINING**

BBs like things neatly packaged. They like clear, direct and to the point instructions! They do not want to be force-fed everything up front and in one hour! They want the initial, basic info needed to get them started. When they need or want more info, then provide it! Our way of training is overwhelming! No wonder we have trouble recruiting chapter officers! We make these positions sound they require 60 hours a week!

Training is an important element of Retention. But we must TRAIN WITH RELEVANCE! It must be meaningful and well presented as I just outlined! Eliminate the red tape so associated with government! Mentor them at their request! Throughout any training phase, remember, YOU ARE WORKING WITH UNPAID VOLUNTEERS!

Oh! And don't be alarmed when a BB volunteer resists authority, talks back or questions you! They don't like to be told what to do! Ask, request or suggest a course of action and get their reaction! Treat them as colleagues! Above all, respect their time and priorities! When training, consult and canvass them on how they would do things, programs they want. Be inclusive and make them feel they are important to your chapter, BECAUSE, you know what, they are!

## **RETENTION AND RECORDS**

Actually, this should be part of training! We have tools at the chapter level to help maintain accurate records, primarily, current addresses. M-112s give current chapter membership updates. Use the info to update your chapter M-114. The OAM (Online Activities Module) is updated in real time and has the most recent membership information. Current membership data is part of being professional and permits you to identify and welcome new members, note any address changes and, of course, identify 2nd notices and member drops. Second notices and dropped members require immediate retention action and should be aggressively followed. M-114 provides each members anniversary date. Chapter membership officers can be one jump ahead by contacting members prior to their anniversary, read membership renewal date, and reminding them to pay their renewal dues. It is also a time to push for Dues/Withholding (D/W) to simplify their lives and to save money. You can mail them a reminder with a with a D/W application. D/W is front end Retention!

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## **CHAPTER CLOSING – LOSS OR OPPORTUNITY?**

When I became active in NARFE in 1999, the FLFED had 87 member chapters with 23,700 members. Today, we have 76 chapters with 16,848 or 12.6% loss of member chapters and 34.5% loss of individual members. Invariably, closures are due to no one being willing to become a chapter officer. NARFE has procedures for closing a chapter. However, FPs can appoint interim officers to maintain the chapter.

Two chapters in the FLFED were saved from closing when the District Vice President stepped in, contacted the newer members, in most cases BABY BOOMERS, and asked them if they would be willing to discuss maintaining the chapter open and having meetings. In both cases, the minimum number of members as required by the By-Laws, 5, showed an interest. After several informal mtgs., it was pointed out that, for the chapter to remain "in business," there would have to be a President and a Secretary. In both cases, it was easy to recruit a Secretary and a Treasurer. At that point, seeing that there was a viable interest in keeping the chapter going and several people willing to work, there were volunteers for President and the Vice President slots.

Both of these chapters are now basically run by Baby Boomers who have set their own programs and agenda. One chapter is essentially on its own, but has extended an open invitation to the District Vice President and the second one, now slightly over a year old, still consults the District Vice President and Federation officers as needed. They also have extended an open invitation to the District Vice President to attend. Both of these chapters are working well and their respective BB leaders have maintained an open and inclusive policy with the older members of the chapter who had not been willing to assume leadership roles. The District Vice President, who is also his chapter's president, has extended invitations to the officers in these chapters to attend our meetings.

## **LEADERSHIP & ITS ROLE IN RETENTION**

Chapter leadership and organization sets the tone for a successful meeting and a positive first impression critical for interesting a first timer and for Retention, in general. Meetings should be publicized and programs set well in advance, say, 3 months. Use the newsletter, Public Service Announcements (PSAs), have a phone action committee and call ALL members. Canvass members for program suggestions. Canvass new members to find out their interests, expectations, interest in volunteering for chapter committees. Maintain a full slate of officers, appointed & elected! Diversify your appointed officers. Appointed officers form a pool for elected officers! Follow up with phone calls. Be inclusive, open and insistent!

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Officers should arrive early, have everything set up before members arrive. Not only newcomers, but regulars will appreciate being received and welcomed. Well organized meetings start on time. After the invocation and pledge, introduce new comers, welcome back members who have not attended recently. Ask new members to introduce themselves. Make sure they are not isolated.

Make your business informative, short, to the point and open briefly to Q&A. Invite membership input. Today's BB member brings new & great talents and enthusiasm! Use them to recruit former colleagues. They will sell NARFE and all it offers infinitely better than we can. By the time most of us retired, our work experience and culture had begun to evolve to what is today's work place, a technologically advanced work place. Today's AFE/retiree, matured professionally in this environment that we only saw in its infancy! GET THEM INVOLVED. Find out if additional, alternate evening or weekend meeting dates are an option. Some chapters are doing this in addition to regular meetings with good success. LEADERSHIP SETS THE TONE OF THE CHAPTER! ENTHUSIASM, CORDIALITY, OPENESS AND INCLUSIVENESS WILL INVITE RESPONSIVENESS. Our generation will not be around forever! New members are our future! SUCCESS REQUIRES PERSONAL COMMITMENT!

## **RETENTION TOOLS AND SUMMARY**

Throughout this presentation, I have suggested what could be tried to reverse our trend of losing members. It is by no means intended to imply or suggest that they are everything that can be done.

There is nothing new in any of my suggestions. They have all been presented before, except that it appears we only talk about them and do little to implement them. I have looked at this exercise as an effort to generate interest in Retention and get your ideas. My suggestions in no way imply you have not already implemented some or all of the ideas presented here!

But to summarize suggestions,

Possible Remedial Action:

- Appoint a separate Federation Retention Chair!
- Encourage District Vice Presidents to appoint Retention Committees!
- Appoint a separate Federation D/W Chair!
- Implement a Federation Recruitment Contest to Complement National's!
- Implement a Federation D/W Contest!

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- Implement a separate District D/W-Recruitment Contest!
- Canvass New Members (BBs) on their thoughts!
- Encourage new members to accept chapter jobs!
- Use BB to recruit BB colleagues. Get them involved!
- Be open and inclusive! Exclusivity kills chapters!
- Leadership should listen and talk less!
- Because we got elected does not mean we got a package with all the answers. Had that been the case, we would not be having this meeting!

These are “shortened” NARFE bullet points given me by a baby boomer that could draw in Baby Boomers:

- VOICE ON CAPITOL HILL – NARFE’s reputation and power enable the Assoc to influence legislative decisions that affect lives of AFE’s & Retirees.
- NARFE, the only Association dedicated to preserving & enhancing the retirement benefits of AFE’s & future Federal Retirees.
- Weekly Hotline Messages keep you up to date on latest developments in Congress & Administration proposals.
- Access to NARFE Magazine provides you with the only comprehensive source of legislative analysis and reporting on retirement & health benefits.
- Exclusive access to NARFE’s Legislative Action Center, where you can actively participate by sending your own message to Capitol Hill.
- Access to NARFE Website and NARFE Magazine.
- NARFE perks listed in NARFE Magazine designed to provide NARFE Members with quality options in their search for commonly used products and services that members can evaluate.
- Disaster Relief Grants and College Scholarships are available through FEEA.

FINALLY, SOME NARFE ACCOMPLISHMENTS:

- Preventing reduction of Federal Civilian Retirement Benefits.
- Continuing to fend off cuts to Medicare and Social Security Programs.
- Protecting annual COLAs
- Bringing about Federal Long Term Care Insurance for AFEs and retired Federal employees.
- Getting FERS unused sick leave to be applied to retirement service time calculations.

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