



Headquarters Report

July 2019



Current Activities

- Lobbying
 - Postal reform
 - 2020 federal pay raise
 - OPM-GSA merger
- Grassroots
 - Grassroots Advocacy Month in August
- NARFE-PAC
 - On track to achieve contribution, disbursement, local fundraiser and sustainer goals



Challenges Encountered

- Government shutdown delayed some activities planned for the first half of 2019
- Staff vacancy
- PAC contributing “fatigue”



Steps to Address Challenges

- Focus on strengthening relationships with new members of Congress and new members of committees important to NARFE, as well as the administration
- NARFE-PAC magazine wrap and follow-up mailing generated good results; June solicitation follow-up to be sent late July



Next Up

- Postal reform
- Pay raise
- Meeting with OPM director
- Anticipating possible shutdown October 1



Current Activities

- Transition to one e-newsletter
- Referendum ballot in September issue and online
- Requirements, RFP and proposals for new website



Challenges Encountered

- Staff vacancy in Q1
- Website RFP held pending AMS and branding rollouts
- Referendum ballot unanticipated and unbudgeted



Steps to Address Challenges

- New senior editor as of April
- AMS and branding rollouts under way, so website RFP can move forward
- Research completed on ballot process options



Next Up

- New website
- Centennial planning
- Branding (updated materials, federation/chapter logos, etc.)



Current Activities

- AMS
- 2020 operating and capital budgets
- IT strategy
- Workforce development plan and safety evacuation plan



Challenges Encountered

- AMS fixes first priority
- Limited resources, competing demands



Steps to Address Challenges

- Accelerate and increase webinars for field training for “MX” users of the AMS
- Continue working with Protech to fix incorrect data and other issues in the AMS
- Focus staff training on the AMS
- Discussions on options to ensure long-term organizational sustainability



Next Up

- Development of a three-year plan to move NARFE to break-even or better financial position
- Analysis of all financial systems and processes, including relationships with key vendors such as auditors, investment advisors and bankers
- Develop plan to implement IT strategy
- Implement NEB direction related to current and future NARFE HQ location



Current Activities

- Working with IT and across departments to fine-tune data, procedures and reporting post AMS go live
- Finalizing materials and communications for NARFE's new brand launch
- Working with the Membership Committee on recruitment initiatives
- Working with the communications department on new integrated sales model to include e-newsletter and magazine advertising



Challenges Encountered

- Adjustment in approaches to new member recruitment in light of loss of OPM mailing list
- Adaptation of fundraising strategies to address effect on contributions of membership loss, especially among older, long-term donors
- Need to grow non-dues revenue
- Adoption of new brand



Steps to Address Challenges

- Member recruitment
 - Increased webinars from 12 to 18 for 2019
 - Print ads in NAPS and UPMA June publications
 - Worked with the Membership Committee to revise membership applications.

- Advertising
 - Online lead generation advertising in GovEvents.com underperformed. Will test again. Webinars are listed among the events on the site.
 - Continue to research advertising opportunities in high-density fed areas.



Steps to Address Challenges

– Fundraising

- Early results positive for direct mail campaigns including increased segmentation, non-premium solicitations and engagement devices in follow-up mailings
- Digital campaigns continue to be developed and show promise in eliciting response from first time donors

– Non-dues revenue

- In-house ad sales
- Survey to quantify interest in “Find a Financial Advisor” so business plan can be developed



Steps to Address Challenges

– Brand

- Brand Guidelines manual has been prepared as a tool for headquarters, the field and our vendors
- A short video has been prepared to introduce NARFE’s new brand in the field, at events and through social media.
- Announcements in the August issue of the magazine and the July *NARFE Insider*
- A “starter” brand Q&A sheet has been prepared for officers in the field, which we will expand as needed



Next Up

- Continue training on the new AMS in order to take advantage of the opportunities it offers
- Hire in-house staff for integrated sales
- Develop association-wide brand acceptance program, including a recognition program linked to achievement of brand standards



Major Focus Items

- Financial sustainability
- HQ building
- Centennial
- Branding
- Referendum
- Building relationships