

2014 NORTH CAROLINA FEDERATION MEMBERSHIP PLAN

INTRODUCTION

For the past two years the NC Federation of Chapters has been working under the guidelines of the 2011-2012 Retention and Action Plan to recruit and retain the members necessary to build and maintain the NC Federation and NARFE. We know this plan achieved some success, with members choosing to drop their membership decreasing from approximately 80 per month to approximately 50 per month.

Yet, we also acknowledge that the NC Federation of Chapters is in transition. The past structures, methods, and practices may no longer be enough to ensure that the future will be as bright as we want it to be. We are seeing a decline in membership, fewer new members, and an aging member base, with some of this for reasons beyond our control. Chapter closings and mergers are resulting in our having fewer but larger chapters, yet not necessarily with the chapter leadership and active involved membership that they need.

We now believe that the 2011-2012 Plan should be replaced with a new Membership Plan. We know there is much more that we need to do, and can do, at the chapter, area, and Federation levels. We believe that the future of the NC Federation of Chapters should be the one that we create, rather than the one that we allow to happen. We believe that it will be a positive future, robust and viable, driven by active recruitment and retention initiatives, but also with an increased emphasis on the strengthening of chapters and local leadership development. The 2014 NC Federation Membership Plan, with the active assistance of everyone involved, will help us create that future.

MEMBERSHIP PLAN

The new 2014 NC Federation Membership Plan will consist of three main points of emphasis: Visionary Activities, Chapter Assistance Activities, and Basic Recruitment and Retention Activities. Since NARFE membership, and NARFE itself, is in transition it is vital that we broaden the focus of our membership program. Our traditional basic approaches are still needed, but other strategies must be included. The outline below is a plan consistent with that thinking:

A: VISIONARY ACTIVITIES – Federation Membership Committee, Membership Coordinator, and Executive Board

1. Develop a Clear Set of Long-Term Initiatives, in Addition to Those set Forth in This Plan, Necessary to Create the Future Envisioned for the Federation and Chapters Five to Ten Years from Now and Beyond – This should be based on current and anticipated trends, membership interests and abilities, and the perceived interests and involvement of new members. Communicate this set of initiatives to the Federation membership and, where appropriate, to NARFE Headquarters. Due Date (DD): Beginning February 2014 and ongoing.
2. Seek a Fourth Option That Will Help Retain Members When Chapters Close – Currently when a chapter closes, members of that chapter have three options: 1) transfer to

another chapter; 2) transfer to the national eNARFE chapter; or 3) drop their membership. If a chapter is remotely located the third option may be the one of choice, particularly for more senior members who do not use the Internet. NARFE Headquarters will be encouraged to consider a federation-only or national member-only option, or devise some other means that will assure the retention of members, particularly when a remotely located chapter closes. DD: April 2014

B: CHAPTER ASSISTANCE ACTIVITIES – Federation Membership Committee, Membership Coordinator, Area Vice Presidents, and Chapters

1. Area Vice Presidents Will Complete a Chapter Leadership Survey with Each Chapter in Their Areas – This survey requires communication between the Area Vice President and each chapter for the purpose of determining its current level of Membership Recruitment/Retention, communication, and other activities (Service, PR, meetings, outreach, response to NARFE requests, etc). This process should be flexible but still enhance the Area Vice Presidents' and Federation Membership Committee's knowledge of each chapter's current level of activity and abilities. DD: May 2014 (Reported at August Board Meeting)
2. Examine Chapter Leadership Strengths and Challenges – For each chapter the Area Vice President should use information from B: 1 and other knowledge of/communication with chapters to identify chapter leadership strengths and deficiencies and determine a chapter's success and/or inability to fill elected and appointed positions. For example: Are all or can all elected and appointed positions be filled? How long have officers been serving and is it by choice or because no one else will step forward? Is there a succession plan? DD: July 2014
3. Develop Federation Membership Committee Plans for Assisting Chapters – The NC Federation Membership Committee should identify solutions that will assist AVPs and chapters in addressing their identified needs and weaknesses. DD: Beginning August 2014 and ongoing.

C: BASIC RECRUITMENT AND RETENTION ACTIVITIES – Chapters and Membership Coordinator

The Federation's Membership Coordinator, in cooperation with Area Vice Presidents and Chapter Presidents, will work directly with Chapter Membership Chairs or designated membership officers to implement the following parts of the Federation's Membership Plan and to strengthen recruitment and retention activities at the chapter level:

1. Each Chapter, Through Its Own Self Assessment, Should Identify Its Uniqueness and Ability to Serve NARFE and Its Membership, and to Improve Chapter Leadership, Recruitment, and Retention – Each chapter, in a special brainstorming/planning meeting or other meeting venue, should identify its uniqueness in membership, location, membership needs, and chapter abilities. This information should be used to

improve communication, including use of the Internet, inclusiveness, meeting schedule, time and location and meeting content. The purpose is to make a good chapter a better chapter. Chapters should invite their Area Vice President to their meeting or provide a summary of their meeting to their Area Vice President. DD: May 2014.

2. Promote Dues Withholding to Increase the Number of Sustaining Members -- Contact all non-dues withholding chapter members and strongly promote "Dues Withholding." Utilize assistance available from the Area Vice President, the Federation's Membership Coordinator, and Web Master, such as Federation incentives and assistance with forms and other means unique to each chapter, to support this effort. Dues withholding applications are available from NARFE Headquarters. DD: Initial contact by July 2014 and ongoing.
3. Use the M112 and/or OAM Reports from NARFE Headquarters to Track Membership Activity to Enhance Recruitment and Retention – The Chapter Membership Chair or other designated member(s) should personally communicate with each member listed on the M112 report (new report available monthly) or the OAM reports (current updating) in the following categories: Dropped, Sent Second Renewal Notice, Potential Members, New Members, and Reinstated Members. These reports are useful membership tools made available on NARFE's website (www.narfe.org) and can be accessed with user names and passwords established by the Chapter President. Potential members and dropped members should be made aware of the two membership options: Local chapter and national eNARFE Chapter. DD: Ongoing.
4. Use a NARFE Information Booth or Table to Contact Potential Members and to Raise Awareness of NARFE – Each area should plan and complete where possible at least one "NARFE Information Booth or Table" activity at a convention, fair, or other gathering within the Area to highlight NARFE. Single local events should also be considered as good outreach to prospective members. Areas should utilize materials made available by the Federation to each Area, as well as free informational material from NARFE Headquarters, including application forms and free NARFE magazines. A registration book should be available, and prospective members should be encouraged to sign in with their contact information for follow-up communication by the chapter membership chair or president. DD: Ongoing; events will be reported via Area Vice President quarterly reports.

D: PLAN IMPLEMENTATION

1. For each major element of this Plan we have developed action items detailing who is responsible for the action, what action is required, and the deadline for accomplishment. We have also developed a Chapter Leadership Survey for Area Vice Presidents to use in completing the assessment of their assigned chapters. In addition, we have supplemented the plan with lists of recruitment and retention best practices

from the Virginia and Tennessee Federations. All of these documents are listed below and are attached.

2. **What's Next?** This Plan is a living, working document. It takes effect immediately, but will be refined continually as it unfolds. Some portions may be deleted, others may be changed, and still others may be added to. There will be new documents provided, such as guidance for public relations, additional best practices lists, and record keeping tools. Other documents already in use may be discontinued or modified. First and foremost, however, feedback from chapters to inform the Federation on how the plan is working will, in large part, determine how the Plan evolves.

3. **Attachments**

- A. Action Items for 2014 NC Federation Membership Plan
- B. NC Federation Chapter Leadership Survey
- C. Virginia Federation Best Practices
- D. Tennessee Federation Best Practices