

**NORTH CAROLINA FEDERATION
OF CHAPTERS
HISTORY**



**National Active and Retired
Federal Employees Association**

MAY 9, 2012

ACKNOWLEDGEMENT IS PROVIDED

To work done by

William M. Radford, NCFOC Historian in the early 1990s,

For documents prepared in 1991 and 1993, and to work done by

Historian, Steve Henderson, in 2002

Entitled

"History of the North Carolina Federation of Chapters

Of the

National Association of Retired Federal Employees"

FOREWORD

Three previously published documents about the history of the North Carolina Federation of Chapters of the National Association of Retired Federal Employees appeared in 1991, 1993, and 2002. Those documents listed on the proceeding pages provided basic information for this update.

This history tries to answer basic questions about the following:

- WHO are we? The North Carolina Federation of Chapters (NCFOC) of the National Active and Retired Federal Employees Association (NARFE). The name was changed in 2004.

- WHAT do we accomplish? We support the objectives of NARFE as set forth in its Articles of Incorporation. We are united for the mutual benefit of chapters in North Carolina, and we protect, promote and defend the benefits of current federal employees and the general welfare of present and future annuitants of federal civilian service.

- WHERE are we located? There are 52 active chapters throughout the state, within six distinct areas of the North Carolina Federation of Chapters.

- WHEN did we organize? From its earliest beginnings in 1956, in the disbanded Federation of the Carolinas through 2012, with chapters organized between 1964 and 1997 in the North Carolina Federation of Chapters, we seek members to support NARFE priorities.

- WHY does NARFE, and especially the NCFOC, remain viable? NARFE is a Political Action Committee (PAC), which is the principal advocate for the health, subsistence, and annuity benefits of current employees, annuitants and their survivors. With Federations in every state and in several overseas territories, NARFE and its state Federations bring these legislative political issues to decision makers in the federal government and the US Congress.

- HOW does the NCFOC meet the needs of its members? Through its elected and appointed Federation officers who serve on its Executive Board, the North Carolina Federation of Chapters keeps chapters informed about NARFE national legislative issues and specific state legislative concerns. A quarterly newspaper is published to inform chapter members throughout North Carolina about issues. Also, a yearly convention is held to establish priorities for the upcoming year and to elect knowledgeable, committed and dedicated individuals who will accomplish the work of the NCFOC.

- HOW MUCH have we done in the past and what can we do in the future? This document provides some answers and plans, as we move into the 21st Century.

As editor of this document, I have updated the 2002 document. In addition, information has been provided by the North Carolina Federation Executive Board of 2011-2012 (See Appendix

3) and proof-read by other NCFOC members. My sincere appreciation goes to all who took their time to help produce this document. Without their assistance the project could not have been completed. Please read this document and communicate with me via email at fc london@frontier.com or via regular mail to Carolyn C. London at 2715 Montgomery Street, Durham, NC 27705-5717 if you think major changes are needed. I did not change any of the observations and notes regarding events prior to 2002 that were provided by Steve Henderson. No Federation Historian has been appointed since that time as far as I have been able to determine.

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HISTORY OF THE NORTH CAROLINA FEDERATION OF CHAPTERS

The Early Years - Federation of the Carolinas - 1956 to 1964

The North Carolina Federation of Chapters (NCFOC) of the National Association of Retired Federal Employees (NARFE) began on December 6, 1956, when five federal retirees from both North Carolina and South Carolina met to form a Federation. Misters E.R. Echard, Frank Parker, Daniel G McMillan, Paul Leonard, and D. Ross Archer applied for a "Federal Charter for the areas of the Carolinas." Through their efforts, eight chapters from North Carolina and four chapters from South Carolina formed a combined Federation, since South Carolina did not have enough established chapters to start its own organization. The Federation of the Carolinas consisted of these chapters:

Chapter	Number	Chapter	Number
Charlotte, NC	105	Charleston, SC	72
Asheville, NC	156	Columbia, SC	87
Raleigh, NC	192	Greenville, SC	121
Greensboro, NC	211	Spartanburg, SC	560
Hendersonville, NC	214		
Wilmington, NC	337		
Winston-Salem, NC	454		
Durham, NC	566		

Two chapters, Cape Fear-Fayetteville, NC Number 276 and Charleston, SC Number 157, did not participate in this application to form a Federation.

OBSERVATION: Why were there two separate chapters in Charleston, SC? Also, why did these two chapters decline to join or why were they not allowed to join?

In the application submitted by the five founders, signed by Frank Parker of Raleigh, the following officers are listed:

President	E.R. Echard, Linville Falls, NC
1st Vice President	P.H. Leonard, Columbia, SC
Secretary-Treasurer	Mrs. Bonnie W. Hawkins, Spartanburg, SC
Assistant Secretary/Treasurer	Mrs. Onida Saunders, Charlotte, NC
Assistant Chaplain	H.W. Stallings

After Frank Parker sent the initial application in December 1956, President Echard submitted this list of officers to National Headquarters on February 8, 1957:

President	E.R. Echard
1st Vice President	P.H. Leonard
2nd Vice President	D.S. McMillan
Secretary-Treasurer	E.R. Justice

Assistant Secretary-Treasurer
Chaplain
Assistant Chaplain

Mrs. Onida Saunders
Abb J. Blanton
H.W. Stallings

Elected Officers

Elected officers of the Federation of the Carolinas during the period 1957 to 1964 included:

Year	President	Vice President	Secretary	Treasurer
1957	E.R. Echard	P.H. Leonard, 1st D.S. McMillan, 2d	E.R. Justice O. Saunders, Asst.	E.R. Justice O. Saunders, Asst.
1958	E.R. Echard	none	O. Saunders	H.L. Bolick
1959	Vance Smith	none	O. Saunders	Frank Black
1960	Vance Smith	none	O. Saunders	Frank Black
1961	J.C. Thomas	none	Carrie Hepler	Frank Black
1962	P.E. Hauser	none	Mrs. D.R. Archer	Frank Black
1963	Wilmer Stine	none	Mrs. Archer	Frank Black
1964	Wilmer Stine	none	Mrs. Archer	W.D. Lee

After Mr. E.R. Echard served two terms as President of the Federation of the Carolinas, he was elected Field Vice President of District 5A in 1958. In this capacity, with the assistance of D. Ross Archer, he organized chapters in Marion - 667 and High Point - 668. In addition, between July 1958 and July 1962, two chapters: Newberry - 772 and Anderson - 825, were organized in South Carolina; also, ten more chapters: Hickory - 692, Morganton - 696, Salisbury - 720, Murphy - 756, Franklin - 774, Rocky Mount - 781, Laurel Springs - 800, Washington - 804, New Bern - 808, and Sanford - 826 were founded in North Carolina.

OBSERVATION: It appears that Mr. E.R. Echard of Linville Falls, NC was the driving force in the Federation of the Carolinas. He was elected President of the Federation and then Field Vice-President for District 5A of the National Association of Retired Civil Employees (NARCE). He was the organizer/founder of various chapters, certainly with the assistance of Mr. D. Ross Archer and others; however, he was the primary motivator in the early years of NARFE activities in North Carolina.

Meeting Locations - Federation of the Carolinas

Meetings of the Federation of the Carolinas, probably with no more than 50 members attending, were held yearly at:

- | | | | | | |
|--------|----------------|--------|---------------|--------|--------------------|
| - 1957 | Asheville, NC | - 1960 | Charlotte, NC | - 1963 | Hendersonville, NC |
| - 1958 | Greenville, SC | - 1961 | Asheville, NC | - 1964 | Greensboro, NC |
| - 1959 | Greensboro, NC | - 1962 | Raleigh, NC | | |

OBSERVATIONS: The retirees who were part of the Federation of the Carolinas probably began their federal careers in the late 1920s and early 1930s. They likely were natives of various southern states, but probably from North and South Carolina. Also, it is probable that they had served their federal careers, interrupted with a stint in the US military in World War II, in the Carolinas. Many federal offices had their beginnings during the depression years and World War II. Federal offices such as those from Agriculture, Defense, Environment, Education, Welfare, Justice, Aviation, Post Office, Weather and others with "extension" offices in the Carolinas provided the retirees who comprised the five hundred members of the Federation of the Carolinas.

Federal retirees in this Federation were schooled in old rural southern ways of thinking which pervaded the times (1957 to 1964). Segregation was a fact of our social framework. The retiree organization was made up of southern whites who happened to be federal retirees. Their ways of doing business, recruiting new members, establishing chapters and furthering the ideals of the Federation mirrored southern thinking during these years.

The Middle Years - NC Federation of Chapters - 1965 to 1978

On April 25, 1964, at its meeting in Greensboro, convention delegates voted to dissolve the Federation; new chapters had been formed in both states and enough had been established so South Carolina could request a charter for its own Federation. When the North Carolina Federation of Chapters came into being, these officers were elected:

President	J. C. Gay, Raleigh
Vice President	Edgar Wyrick, Greensboro
Secretary-Treasurer	W.D. Lee, Raleigh
Executive Committee Chair	Ralph Jenkins, Charlotte
Legislative Committee Chair	E.R. Echard, Linville Falls

NOTE: The records of NCFOC only provide information about the elected offices of President, Secretary and Treasurer. The Vice President, Executive Committee Chair, and Legislative Committee Chair are not discussed.

The newly formed North Carolina Federation included these 19 chapters:

Chapter	Number	Chapter	Number	Chapter	Number
Charlotte	105	Winston-Salem	454	Morganton	696
Asheville	156	Durham	566	Salisbury	720
Raleigh	192	Lenoir	601	Murphy	756
Greensboro	211	Marion	667	Franklin	774
Hendersonville	214	High Point	668	Laurel Springs	800
Wilmington	337	Hickory	692	Washington	804
				New Bern	808

OBSERVATION: When one considers the map of North Carolina (See Appendix 2) and notes where the 19 chapters of this new Federation are located, 16 of them are situated west and north of Raleigh. Only Wilmington, New Bern and Washington are Federation chapters in the southern and/or eastern parts of the state. The major population and primary industrial centers of North Carolina were well represented. In future years another 40 + chapters would be established; 32 of these would be situated west and north of Raleigh.

QUESTION: Why were Cape Fear – Fayetteville Chapter 276, Rocky Mount Chapter 781 and Sanford Chapter 826 not part of the North Carolina Federation of Chapters in April 1964? The Fayetteville chapter existed since December 7, 1953 but had not been a part of the old Federation of the Carolinas.

The Rocky Mount chapter had been chartered May 4, 1961 and the Sanford chapter had been chartered June 13, 1962; both were among the group of chapters formed in District 5A. Are there facts or opinions available that relate to this question?

On July 18, 1964, the National Office of the Association of Retired Civilian Employees issued a charter to the North Carolina Federation of Chapters. At the bottom of the charter, these words are typed:

"A Charter was issued to this Federation April 27, 1964, signed by Glenn R. Simcox, National President and attested by Clarence M. Tarr, National Secretary."

Growth of the Organization

In 1964, the North Carolina Federation of Chapters had 510 members in its 19 chapters. State dues, the only financial support for the Federation at that time, had been established at 10 cents per member at the first Federation meeting in Asheville in 1957. At an unspecified later date, Federation dues were increased to 50 cents per member. Apparently, at no time was there more than about \$50.00 in the Federation bank account. Expenditures were "the salary of the president - \$100.00 per year - and the salary of the secretary-treasurer - \$50.00 per year." The Federation bought stationary and postage supplies; however, board members paid their own travel expenses.

The new Federation established itself, mostly in the northern and western cities of the state. By 1965, Greensboro had become the largest chapter with 124 paid members; Asheville had 75 paid members; Charlotte had 72 paid members; and Murphy had only 8 paid members. Over the years between 1964 and 1971, membership increased from 510 members in 1964 to 3,800 in January 1972. This is a more than seven-fold increase in membership in just over seven years.

Chapters Incorporated and Several Closed

Between 1965 and 1978, the number of chapters in the NC Federation increased from 19 to 36. The chapters in Fayetteville, Rocky Mount and Sanford came into the organization. In addition, chapters in Henderson, Hamlet, Goldsboro, Weaverville, Wilkes County, Albemarle,

Kannapolis, Carteret County, Rockingham, Wilson, Boone, Coastal, Smoky Mountain and Pitt County were organized and made part of the North Carolina Federation of Chapters.

NOTE: Seven chapters were closed (one of these was reactivated) during this period: Goldsboro - 954 on March 5, 1968; Sanford - 826 on May 5, 1971 (but reactivated on September 5, 1975); Hamlet - 951 on January 31, 1972; Henderson - 938 on September 1, 1977; Lenoir 601 on March 1, 1977; Murphy - 756 on March 27, 1978; and Weaverville - 964 on December 17, 1978. Therefore, after 13 years of being a Federation, the NCFOC had 30 chapters as of 1978.

Elected Officers of NCFOC - The Middle Years

Delegates, probably 50-60, at conventions of the NC Federation of Chapters elected these officers who served from 1965 through 1978:

Year	President	Secretary	Treasurer
1965	J. C. Gay	William D. Lee	William D. Lee
1966	J. C. Gay	William D. Lee	William D. Lee
1967	Boyce Moore	Mrs. Essie Niedermeyer	Essie Niedermeyer
1968	J. Eddie Robbins	Mrs. D. Ross Archer	Mrs. Archer
1969	J. Eddie Robbins	Mrs. Archer	Mrs. Archer
1970	C. F. Parrish	Mrs. Archer	Mrs. Archer
1971	C.F. Parrish	Mrs. Archer	Mrs. Archer
1972	T. J. Cheek	Mrs. Archer	Mrs. Archer
1973	T. J. Cheek	Mrs. Archer	Mrs. Archer
1974	T. J. Cheek	Mrs. Archer	Mrs. Archer
1975	W. M. Whittington	Mrs. Clarence Peace	Mrs. Peace
1976	Albert Wagoner	Mrs. Peace	Mrs. Peace
1977	Charles R. McCarty	Mrs. Elizabeth Fuller	Mrs. Fuller
1978	Charles R. McCarty	Mrs. Fuller	Mrs. Fuller

OBSERVATION: Only 13 people held elected positions during these first 14 years. Eight served as president and five were both secretary and treasurer. Getting volunteers to serve was a chore then, even as it appears to be in later years.

Areas Created - The Middle Years

Delegates at the 1970 State Convention recognized that the Federation needed to organize new chapters and to help established chapters become stronger. Apparently, no action was taken in 1970; however, at the 1971 convention, delegates voted to allow the Federation president to appoint Field Vice Presidents (later designated Area Vice Presidents) to perform these functions. Therefore, during his term in office, President Tom Cheek contacted National Headquarters about providing support to state Federations to organize new chapters. The North Carolina

Federation of Chapters did not have the resources to fund organizational expenses. Also, state officers should not be expected to pay for these expenses out of pocket. Eventually, National headquarters voted to return ten percent of national dues to state Federations. The stated intent of this refund is to defer expenses state Federations have when organizing chapters, reactivating chapters, and assisting in the administration of chapters.

An important addition to the administration of the NC Federation of Chapters occurred in 1972 when the Bylaws of the Federation were amended. State Convention Delegates, probably about 60 by this time, voted to authorize the Federation president to appoint three Area Vice Presidents. President Cheek appointed three NCFOC members, who served until the State Convention in 1975.

Paul B. Hobgood	New Bern Chapter 808	Coastal Plain
William D. Lee	Raleigh Chapter 192	Piedmont Area
Peter J.O. Smith	Asheville Chapter 156	Western Area

The practice of holding Executive Board Meetings with the President, Secretary/ Treasurer and the appointed Area Vice Presidents in attendance were established at this time. These meetings were held in both Raleigh and Greensboro.

When the six Areas of the NC Federation of Chapters were established at the 1975 State Convention, NC Federation President W.M. Whittington appointed the following:

Area I	Henry L. Fuhry	Swannanoa
Area II	M. G. Perry	Charlotte
Area III	M. G. Green	West Jefferson
Area IV	William D. Lee	Raleigh
Area V	W. M. Stanley	Wilmington
Area VI	C. W. Overman	Edenton

Also in 1975, Grady F. Watkins of Fayetteville was appointed Special Assistant for Organization in Region V. At a later State Convention (probably 1977), the position of Director of Field Operations was established; however, both of these posts were abolished.

OBSERVATIONS: The period 1965 to 1978 was a time of steady growth for the North Carolina Federation of Chapters. Membership steadily increased, especially in the first seven years. Chapters were started in 15 additional locations and the three established chapters Fayetteville, Rocky Mount and Sanford joined the Federation. One-sixth of the 36 chapters were closed because the membership base disintegrated, probably due to deaths and/or member relocation.

The addition of Area Vice Presidents signaled the need to have strong leaders in different sections of the state to work on behalf of the Executive Board to assist chapters during these times of heavy growth. The strong president could only do so much. The NCFOC had become

large and its diverse membership required both state and national support to nurture the legislative issues important to annuitants.

This period was also characterized by a heavy increase in federal retirees who had entered civil service during World War II and who were now retirement eligible. There was a greater influx of retirees who were born outside of North Carolina but who had worked most of their careers at federal facilities located throughout the state. Many of the old southern ways of operating changed, with the steady increase of outside retirees who called North Carolina home. These non-native North Carolinians brought urbane ideas, progressive attitudes, and different thinking to the organization.

The Federation Newspaper

Along with the increase in chapters and the greater number of members who joined the North Carolina Federation in the 1970s, the Federation newspaper was launched in 1973. The July/August 1973 issue of the North Carolina Federation of Retired Federal Employees was published by A.L. Ross & Sons of West Palm Beach, Florida, which published the newspaper until the May/June issue of 1975.

A campaign to have A.L. Ross & Sons replaced had been led by Rudolph (Rudy) Schaeffer, an editor of the paper during that time. Due to his efforts, another publisher, Longview Publishing Company of Atlanta, Georgia, was contacted in the summer of 1975. After the owners, Glenn Jursczk and Jay Nowak, met with the Federation Executive Board in Raleigh on January 23, 1976, they agreed to publish the newspaper free of charge on a bi-monthly basis. Final agreement was reached and a contract was signed in March 1976. At some point the newspaper title changed to the N.C Federal Retiree & Employee. Editors of the N. C. Federal Retiree & Employee have included:

July 1973 – October 1977	Rudy and Alyne Schaeffer
October 1977 – May 1983	Dwight L. Crowell, Jr.
May 1983 – June 1983	Joseph Kelly
July 1983 – January 1988	Charles Lehning
Feb 1988 – May 1988	William M. Radford
May 1988 – April 1990	Elsie M. Parker
May 1990 – April 1995	William M. Radford
May 1995 – April 1998	Ray Arends
May 1998 – April 2001	Marian K. Zang
May 2001 – April 2003	Pat Coleman
May 2003 – April 2006	Avery Ghent
May 2006 – April 2011	Betty Whitten
May 2011 – April 2012	Sabine Dieringer

NOTE: The Editor of the *NC Federal Retiree & Employee* serves as an officer appointed by the NCFOC President. Along with other appointed officers, the Editor sits on the Federation Board.

The newspaper was published free of charge from March 1976 until May 1981. However, because of increased costs of labor, supplies, equipment and postage, Longview Publishing Company President, Glenn Jurszck, proposed that a 55 cents per year per member fee be paid. At the state convention in 1981, this fee was approved. Then, the fee was raised to 60 cents per year per member in 1983. In June 1990, postal authorities stipulated that the Federation newspaper could no longer be mailed under the classification "cooperative mailing;" instead, it would have to be mailed under either second class or third class rates. This increase in postage jumped from 8.4 cents to 22.1 cents per paper. The publishing company could not absorb this increase in mailing costs; therefore, the Executive Board approved the cost of the increase in postage. A new contract was processed in October 1990, which included a stipulation that the cost of the paper to the Federation would increase in proportion to the increase in postage for future issues.

In 2003, William Cannon, Sarah Gonzales, and Avery Ghent negotiated with the Oxford, NC Home for Children (a Masonic Institution) to print the paper at a very competitive cost. The paper is one of several printed in Oxford as part of a training program for orphans at the Home for Children. In 2006, the editor suggested that the newspaper change to a quarterly publication as many other Federations had already done. Currently, each Federation Board Member is required to submit an article for each issue to the Editor via email. The Editor reviews, makes corrections, and sets parameters for length of articles to ensure equitable space for everyone. Any NARFE member is invited to submit articles and photographs to the newspaper. The newspaper strives to address the concerns of Federal retirees and employees, and their survivors, and to promote the growth of NARFE in the state of North Carolina. The Home for Children assigns a Graphics Specialist, who designs the format and coordinates with the Editor until the paper is printed and distributed. Copies of the newspaper are archived on the website at www.ncnarfe.info and are available for viewing by anyone who has access to the website.

Subscriptions to the newspaper are \$7.00 annually. The subscription rate for NARFE members is included in the dues. The newspaper is the official publication of the NCFOC of NARFE. Mailing to NARFE members begins approximately 60 days after NARFE National headquarters receives membership dues.

The Past 35 Years - NCFOC - 1978 to 2012

OBSERVATIONS: During these more than three decades of the NCFOC, decisions made in the 1980s influenced NARFE members until the present. The needs of federal civilian retirees often coincided with those of military retirees; so, coalitions were founded with entities like: The Retired Officers Association (TROA), Association of the US Army (AUSA), Reserve Officers Association (ROA), US Air Force organizations, and Veteran groups throughout the state.

The NC Coalition for Legislative Action also eventually came into being. This coalition was formed after retirees felt they were not being treated fairly by the State of North Carolina. This precipitated the formation of the Tax Equity Task Force in April of 1989. As this organization made its mark, it also spurred the formation of The Fourth Branch in 1995. These organizations

focused on the question that North Carolina illegally taxed the annuities of state, local, and federal government retirees. NARFE's nine members contributed major efforts to these coalitions and task forces and persevered in the fifteen-year effort under the Bailey-Emory-Patton Class Action Law Suit. NARFE members were the most vocal and strongest supporters of this legal action. Between 1986 and into 2000, the NCFOC was totally engrossed in all aspects of this law suit.

While these activities were ongoing in the coalitions for legislative action in North Carolina specifically and in the US Congress in general, other questions about health care, survivor benefits, and cost-of-living allowances (COLAs) always came to the forefront of NARFE priorities. Strong leadership in the North Carolina Federation of Chapters provided by the Executive Board during the late 1980s and throughout the 1990s made the NCFOC a major contributor in the coalitions supporting federal issues and within the state legislature and judicial systems advocating the merits of the Bailey-Emory-Patton law suit. (See Appendix 4)

Elected Officers of NCFOC

Delegates (probably about 80-100 in the 70s-80s and about 120-160 in the 90s) at the NC Federation of Chapters conventions elected these officers between 1978 and 2012:

Year	President	Vice President	Secretary	Treasurer
78-79	O.J. Huffman	Charles Lehning	Betty Herring	Betty Herring
79-80	O.J. Huffman	Charles Lehning	Mildred Caudle	Betty Herring
80-81	Charles Lehning	Lennie Atkinson	Betty Herring	Louise Warren
81-82	Charles Lehning	Lennie Atkinson	Betty Herring	Betty Herring
82-83	Charles Lehning	Lennie Atkinson	Eleanor Clark	Betty Herring
83-84	Aaron Berryhill	Charles Alexander	Catheryn Coley	Mary Jo Grimes
84-85	Charles Alexander	Elsie Parker	Catheryn Coley	Alex Bourdas
85-86	Charles Alexander	Elsie Parker	Catheryn Coley	Alex Bourdas
86-87	Elsie Parker	Roy Lovvorn	Kathryn Horton	Alex Bourdas
87-88	Elsie Parker	Avery Ghent	Mary Simpson	Alex Bourdas
88-89	Alex Bourdas	Michael Greeson	Edna Stokes	Helen Shropshire
89-90	Alex Bourdas	Milt Quinn	Elaine Martin	Helen Shropshire
90-91	Milt Quinn	Mary Simpson	Elaine Martin	Helen Shropshire
91-92	Milt Quinn	Ed Bromley	Esther Pritchett	Helen Shropshire
92-93	Ed Bromley	D.G. Harwood	Elaine Martin	Dominic Fetterer
93-94	Ed Bromley	D.G. Harwood	Elaine Martin	Dominic Fetterer
94-95	Elsie Parker	Fain Hambright	Rose Olynick	Dominic Fetterer
95-96	Fain Hambright	Lyle Storch	Rose Olynick	Clarence Bailey
96-97	Fain Hambright	Lyle Storch	Rose Olynick	Clarence Bailey
97-98	Lyle Storch	Bill Austin	Rose Olynick	Clarence Bailey
98-99	Lyle Storch	Bill Austin	Rose Olynick	Clarence Bailey
99-00	Bill Austin	Lillian Creger	Sarah Gonzales	William Cannon

Year	President	Vice President	Secretary	Treasurer
00-01	Bill Austin	Lillian Creger	Sarah Gonzales	William Cannon
01-02	Lillian Creger	Sarah Gonzales	Sue Sloop/W.S	William Cannon
02-03	Lillian Creger	Sarah Gonzales	W. Strawberry	William Cannon
03-04	Sarah Gonzales	William Cannon	Betty Whitten	Bill Ritchie
04-05	Sarah Gonzales	William Cannon	Betty Whitten	Bill Ritchie
05-06	Thomas Hobgood	Paul Carew	Elaine Hughes	Bill Ritchie
06-07	Thomas Hobgood	Paul Carew	Elaine Hughes	Bill Ritchie
07-08	Paul Carew	Elaine Hughes	Gracie Couch	Samuel Crain
08-09	Elaine Hughes	Paul Sams	Gracie Couch	Samuel Crain
09-10	Elaine Hughes	Paul Sams	Gracie Couch	Samuel Crain
10-11	Paul Sams	Vilma Geisert	Gracie Couch	Samuel Crain
11-12	Paul Sams	Vilma Geisert	Gracie Couch	Samuel Crain

The elected officers of the North Carolina Federation of Chapters of NARFE dedicate extensive energy and time to these posts within the Federation. These four officials are the primary members of the Executive Board of the State Federation. Other officials, the six Area Vice Presidents and Federation officers, who serve in various positions appointed by the president, also are part of this important decision-making board of NCFOC.

OBSERVATIONS: In the 47 years the North Carolina Federation of Chapters has existed (1965 through 2012) there have been: 25 presidents, 21 vice presidents, 21 secretaries, and 16 treasurers. Of the 17 presidents, who have served during the past 35 years, 14 previously served as vice president, and one served as treasurer. Only Aaron Berryhill, the president in 83-84, had not previously served the Federation. The trend seems to be that individuals who become president serve for one to three years in other elected positions of the Federation prior to being elected president for a two-year period. Only Charles Lehning (for three years between 81-82 and 83-84) and Elsie Parker (for two years between 86-87 and 87-88 and then one year 94-95) served as president longer than two years. Several Vice Presidents – Lennie Atkinson, Avery Ghent, Michael Greeson and Mary Simpson - held no additional elected office in the Federation. Two other Vice Presidents, D.G. Harwood and Roy Lovvorn, did not become president but served in an appointed office (Alzheimer’s Coordinator) for several years. Among the 17 secretaries, only one man served in that capacity (E.R. Justice 57-58). Between 1965 and 2012, only 61 people held elected offices on the Executive Board of the North Carolina Federation of Chapters.

Area Vice-Presidents



The six Area Vice Presidents of the North Carolina Federation of Chapters either were appointed by the president or elected by the chapters within the specific area since 1975. (On page 6 of this history, the names of the first persons appointed by the president are shown.)

The Area Vice Presidents, members of the Executive Board of NCFOC, appointed by the president or elected by chapter delegates, since the convention of 1978 include:

Years	Area I	Area II	Area III
78-79	Alfred Kohler	no record	no record
79-80	Alfred Kohler	William W. Pegues	Odell S. Andrews
80-81	Alfred Kohler	Emogene Thompson	Odell S. Andrews
81-82	John S. McKenzie	Emogene Thompson	Emory Tesh
82-83	Lucille Wynn	Emogene Thompson	Emory Tesh
83-84	Lucille Wynn	W. Frank Smith	Emory Tesh
84-85	Marshall Cooper	W. Frank Smith	Emory Tesh
85-86	Marshall Cooper	W. Frank Smith	Emory Tesh
86-87	Marshall Cooper	W. Frank Smith	Emory Tesh/Henry Harbuck
87-88	Billy Medford	W. Frank Smith	Henry Harbuck
88-89	Milton Quinn	W. Frank Smith	Ruth Phillips
89-90	Edward W. Piper	Clarence M. Bridges	Henry Harbuck
90-91	Edward W. Piper	Clarence M. Bridges	Henry Harbuck
91-92	Robert F. Baker	Clarence Bailey	Florrie Chase
92-93	Robert F. Baker	Clarence Bailey	Florrie Chase
93-94	Robert F. Baker	Clarence Bailey	Ralph W. Hartgrove
94-95	Robert F. Baker	Robert K. Wilson	Ralph W. Hartgrove
95-96	Robert F. Baker	Robert K. Wilson	Ralph W. Hartgrove
96-97	Robert F. Baker	Robert K. Wilson	John A. Koivisto
97-98	Charles H. Dickens	Robert K. Wilson	John A. Koivisto
98-99	Charles H. Dickens	Bill Ritchie	John A. Koivisto
99-00	Charles H. Dickens	Bill Ritchie	Hank Poff
00-01	Charles H. Dickens	Bill Ritchie	Hank Poff
01-02	Inez R. Angus	Bill Ritchie	Hank Poff
02-03	Inez R. Angus	Bill Ritchie	James Whitten
03-04	Inez R. Angus	Bob Wilson	James Whitten
04-05	Freida Terrell	Bob Wilson	James Whitten
05-06	Freida Terrell	Bob Wilson	James Whitten
06-07	Freida Terrell	Daniel Schmidt	James Whitten
07-08	Freida Terrell	Daniel Schmidt	David Spangler
08-09	Freida Terrell	Daniel Schmidt	John Koivisto
09-10	Freida Terrell	Sue Hawkins	Larry Standley
10-11	Freida Terrell	Sue Hawkins	Larry Standley
11-12	Freida Terrell	Sue Hawkins	Betty Whitten

Years	Area IV	Area V	Area VI
78-79	no record	no record	no record
79-80	J. Kenneth Buffaloe	Lennie Atkinson	T. Ralph Tyler

Years	Area IV	Area V	Area VI
80-81	J. Kenneth Buffaloe	Lennie Atkinson	T. Ralph Tyler
81-82	J. Kenneth Buffaloe	Elsie Parker	T. Ralph Tyler
82-83	Louise Warren	Elsie Parker	T. Ralph Tyler
83-84	Louise Warren	Elsie Parker	Charles Le Beau
84-85	Louise Warren	Wm Radford/Sam Duke	T. Ralph Tyler
85-86	Louise Warren	Robert Liebert	T. Ralph Tyler
86-87	Louise Warren	Robert Liebert	Charles Overman
87-88	Clairborne T. Hill	Robert Liebert	T. Ralph Tyler
88-89	Melvin K. Kolbe	Thelma Thomas	T. Ralph Tyler
89-90	Melvin K. Kolbe	Thelma Thomas	Milton E. Smith
90-91	Melvin K. Kolbe	Elsie Parker	Milton E. Smith
91-92	Melvin K. Kolbe	Elaine F. Martin	Milton E. Smith
92-93	Melvin K. Kolbe	Mae Spicer	R. G. Shell
93-94	Melvin K. Kolbe	Robert Klein	Phifer Paul Rothman
94-95	Lyle Storch	Robert Klein	Phifer Paul Rothman
95-96	Albert Tanner	Snodie B. Wilson	Edwin H. Karnowski
96-97	Albert Tanner	George R. Hatcher	Edwin H. Karnowski
97-98	Bruce Woodard	George R. Hatcher	Lillian Creger
98-99	Bruce Woodard	George R. Hatcher	Lillian Creger
99-00	Thomas Hobgood	George R. Hatcher	Terry Wethington
00-01	Thomas Hobgood	George R. Hatcher	Terry Wethington
01-02	Thomas Hobgood	Kenneth Strawberry	Terry Wethington
02-03	Thomas Hobgood	Kenneth Strawberry	Terry Wethington
03-04	Thomas Hobgood	Robert Bartlett	James Maestas
04-05	Edsel Morgan	Robert Bartlett	Joe Childers
05-06	Edsel Morgan	Paul Sams	Walter Smith
06-07	Bennie Saunders	Paul Sams	Glenda McRary
07-08	Bennie Saunders	Vilma Geisert	Glenda McRary
08-09	Bennie Saunders	Vilma Geisert	Glenda McRary
09-10	Bennie Saunders	Vilma Geisert	Walter Smith
10-11	Bennie Saunders	Lloyd Geisert	Walter Smith
11-12	Bennie Saunders	Lloyd Geisert	Walter Smith/Nancy Batchelor

OBSERVATIONS: There have been 62 individuals who have served as Area Vice Presidents, 8 during the early years when the NCFOC President appointed them and 54 during the years 78-79 through 01-02 when chapters elected the Area Vice President, based on nominations from chapters in the specific area. Since the establishment of Areas in 78-79, the 54 VPs include: Area I - 10 VPs (8 men and 2 women); Area II - 7 VPs (6 men and 1 woman); Area III - 8 VPs (6 men and 2 women); Area IV - 8 VPs (7 men and 1 woman); Area V - 12 VPs (7 men and 5 women); Area VI - 9 VPs (8 men and 1 woman). Five of these former Area Vice Presidents - Milt Quinn, Lyle Storch, Elsie Parker, Lillian Creger, and Tom Hobgood - were elected President of the North Carolina Federation. Milt Quinn was elected as NARFE Region X Field Vice President late in 1996.

Appointed Federation Officers of NCFOC

Over the years since 1978, there have been various appointed officer positions in the North Carolina Federation of Chapters. The president of the Federation appoints individuals with the concurrence of other members of the Executive Board. Several of these appointed positions either have been re-designated or have been abolished; i.e.; Mr. Tom Cheek was appointed Legislative Assistant plus Mr. Joseph Primereno and then Mr. Alfred Kobler held the position of Director of Field Operations. Two past presidents, Alex Bourdas and Fain Hambright, held the title of Building Fund Coordinator. The E-mail Coordinator, filled by Fain Hambright, has been an appointed position since 1999.

The appointed offices of the NCFOC are: National Legislative Officer, State Legislative Officer, Editor, PAC Coordinator, Service Officer, Public Relations Officer, Alzheimer's Coordinator, Historian and Webmaster. These officers are appointed by the President and then are confirmed by the Executive Board for a term of one year. The National and State Legislative officers are members of the Executive Board. The other appointed officers are considered Federation Officers. Since many of these appointed positions were established at the state convention in 1987, this list begins with that year. (Between years 83-84 and January 88, Charles Lehning served as Public Relations Officer for the Federation. Also, the complete list of Editors of the NCFOC paper appears on page 7 and E-mail Coordinator is not shown.) (Please note that other appointed officers are listed on the following page.)

Years	National Legislative	State Legislative	NARFE PAC Coordinator
87-88	George Sabo	William Radford	
88-89	George Sabo	William Radford	
89-90	George Sabo	Lee Paramore	
90-91	George Sabo	Lee Paramore	
91-92	Charles Patton	James Grose	
92-93	Charles Patton	James Grose	
93-94	Charles Patton	Joe Sableski	
94-95	Charles Patton	Joe Sableski	Charles Patton
95-96	Terry Wethington	C.R. Chapman	Charles Patton
96-97	Terry Wethington	C.R. Chapman	Terry Wethington
97-98	Charles Patton	Hernando Palmer	Lyle Storch
98-99	Charles Patton	Hernando Palmer	Lyle Storch
99-00	Lyle Storch	Hernando Palmer	Lyle Storch
00-01	Lyle Storch/Paul Sams	James H. Sears	Paul Sams
01-02	"Bud" Hansen	James H. Sears	Fain Hambright
02-03	"Bud" Hansen	James H. Sears	Dick Michener
03-04	Bill Babb	James H. Sears	
04-05	Bill Babb	James H. Sears	
05-06	Joe Padgett	James H. Sears	Joe Padgett
06-07	Joe Padgett	James H. Sears	Joe Padgett

Years	National Legislative	State Legislative	NARFE-PAC Coordinator
07-08	Paul Sams	James H. Sears	Paul Sams
08-09	Ronald Miller	James H. Sears	Joe Childers
09-10	Ronald Miller	Ronald Miller	Jim Whitten
10-11	Ronald Miller	Ronald Miller	Thomas Hobgood
11-12	Ron Buffaloe	Ron Buffaloe	Thomas Hobgood

Years	Service Officer	Public Relations	Alzheimer's Coordinator	Historian
87-88	Michael Greeson	Charles Lehning	Roy Lovvorn	Lee Paramore
88-89	Charles Alexander	William Radford	Roy Lovvorn	
89-90	Charles Alexander	Elsie Parker	Roy Lovvorn	
90-91	Charles Alexander	Elsie Parker	Alex Bourdas	William Radford
91-92	Charles Alexander	Elsie Parker	Alex Bourdas	William Radford
92-93	Mary B. Simpson	Elsie Parker	Alex Bourdas	William Radford
93-94	Mary B. Simpson	Elsie Parker	Alex Bourdas	
94-95	Milton Quinn	vacant	Alex Bourdas	
95-96	Milton Quinn	Elsie Parker	Alex Bourdas	
96-97	Bill Austin	Elsie Parker	Alex Bourdas	Ray Arends
97-98	Rose S. Olynick	Elsie Parker	D.G. Harwood	
98-99	Rose S. Olynick	Elsie Parker	D.G. Harwood	
99-00	Dorothy Johnson	Elsie Parker	D.G. Harwood	David Spangler
00-01	Dorothy Johnson	Elsie Parker	David Spangler	David Spangler
01-02	Bill Austin	Glenda McRary	Steve Henderson	Steve Henderson
02-03		Aaron Purtee	D. G. Harwood	
03-04	Robert McDougall	Margaret Twilley	D.G. Harwood	
04-05		Vilma Geisert	Margaret Malley	
05-06	Robert Bartlett	Betty Whitten	Margaret Malley	
06-07	Robert Bartlett	Harriet Bartlett	Margaret Malley	
07-08	Robert Bartlett	Harriet Bartlett	Margaret Malley	
08-09	Lloyd Geisert	Doris Maxwell	Margaret Malley	
09-10	Lloyd Geisert	Doris Maxwell	Margaret Malley	
10-11	Lloyd Geisert	Carolyn London	Margaret Malley	
11-12	Lloyd Geisert	Carolyn London	Margaret Malley	Carolyn London

OBSERVATIONS: Federation officers who are appointed by the President and confirmed by other NCFOC Executive Board members become increasingly important to the Federation's smooth operation to support NARFE's national priorities. The National Legislative Officer and the NARFE-PAC Coordinator have major responsibilities. The State Legislative Officer is charged with keeping NCFOC members informed about North Carolina agendas in both legislative and executive branches. Many of these appointed positions have been held by past elected NCFOC officials and they want to continue to serve having expertise which newly elected officials can rely on. Some of these appointed officers run for elected office and several have been successful in becoming elected.

The elected officers, the Area Vice Presidents, and the appointed officers of the Federation know that some of the battles of the 80s and 90s have been won; however, the early years of the 21st century for NCFOC will be filled with challenges. We need to recruit and retain members to continue representing all federal civilian retirees in the PAC which NARFE has become. We need to develop substantial contacts with Federal Employee Retirement System (FERS) employees and retirees to ensure the future of NARFE when Civil Service Retirement System (CSRS) annuitants are no longer a part of NARFE.

The 65 Chapters Created within NCFOC

There have been at least 65 chapters established in North Carolina. 52 of these chapters continue to serve the needs of federal employees, retirees, and survivors in the six designated areas of the North Carolina Federation of Chapters. 19 chapters had administrative actions; ten closed, three closed but merged with nearby chapters, two closed but were reinstated, two were reactivated and two were renewed where old chapters had been closed. Information, cross-checked with NARFE National Headquarters, is provided below:

Order Chapter	Number	Chartered	Other Information
1 Charlotte	105	01-30-52	
2 Asheville	156	03-15-52	
3 Raleigh	192	10-02-52	
4 Greensboro	211	10-23-52	
5 Hendersonville	214	11-03-52	Closed 01-54 Reinstated 08-26-55
6 Cape Fear	276	12-07-53	Deactivated (NFI) Reactivated 05-24-67
7 SENClard	337	12-19-53	Deactivated (NFI) Reactivated 04-20-73.
8 Winston-Salem	454	10-27-54	
9 Durham	566	08-14-56	
10 Lenoir	601	05-03-57	Closed 03-01-77.
11 Marion	667	04-22-58	
12 High Point	668	04-22-58	
13 Hickory	692	11-07-58	
14 Morganton	696	10-28-58	
15 Salisbury	720	06-15-59	
16 Murphy	756	08-09-60	Closed 03-27-78.
17 Franklin	774	01-13-61	Closed when merged with Chapter 1420 - 11-17-88
18 Rocky Mount	781	05-04-61	
19 Laurel Springs	800	11-15-61	
20 Washington	804	10-10-61	
21 New Bern	808	01-18-62	

Order Chapter	Number	Chartered	Other Information
22 Sanford	826	06-13-62	Closed 05-05-71 but Reinstated 09-05-75
23 Henderson	938	06-21-65	Closed 09-01-77
24 Hamlet	951	11-12-65	Closed 01-31-72
25 Goldsboro	954	02-09-66	Closed 03-05-68
26 Weaverville	964	03-10-66	Closed 12-17-78
27 Wilkes Co	979	11-03-66	
28 Albemarle	1005	02-09-67	
29 Kannapolis-Concord	1009	01-12-67	
30 Carteret County	1158	09-24-70	
31 Rockingham	1161	10-02-70	
32 Wilson	1199	06-30-71	
33 Boone	1211	11-08-71	
34 Coastal - Jacksonville	1312	03-06-74	
35 Smoky Mountain	1420	05-06-75	
36 Pitt County	1530	06-14-77	
37 Surry-Yadkin	1611	01-26-79	
38 Statesville	1752	09-08-80	
39 Piedmont/Shelby	1785	02-26-81	Closed 03/05/2010
40 Piedmont/Gastonia	1791	04-21-81	
41 Kinston-Lenoir	1824	05-26-81	Closed 12/12/2005
42 Wayne	1830	06-26-81	
43 Brunswick	1894	06-11-82	
44 Sandhills	1895	08-03-82	
45 Lumber River	1904	09-27-82	
46 S Mecklenburg	1941	03-14-83	Closed 11-04-91.
47 N Mecklenburg	1981	05-16-83	Closed 07-01-97 when merged with Chapter 105
48 Lincoln County	1983	08-12-83	
49 Marjorie Christie	1999	03-06-84	
50 Swannanoa Valley	2007	03-23-84	Closed 06-30-88 when merged with Chapter 156
51 Duplin-Sampson	2046	05-29-85	
52 Harnett County	2047	07-22-86	
53 Bladen County	2048	02-28-86	Closed 06/26/2007
54 Johnston County	2107	04-15-86	
55 Chapel Hill	2108	12-19-88	
56 First Flight	2206	08-09-89	
57 Carolina Mountain	2209	09-22-89	Old Chapter 756 renewed
58 Havelock-Cherry Pt	2211	10-18-89	
59 Alamance County	2245	06-19-91	
60 Intracoastal	2266	03-16-93	

Order Chapter	Number	Chartered	Other Information
61 Mount Airy	2269	12-05-92	
62 Henderson	2289	10-05-94	Old Chap 938 renewed
63 Person-Caswell	2295	07-21-95	
64 Roanoke Valley	2297	08-13-95	
65 Stanly County	2316	12-31-97	

NCFOC Convention Sites

Conventions of the North Carolina Federation of Chapters are commonly held in early May (sometimes late April) each year. Between 1957 and 1964, the Federation of the Carolinas held seven conventions in North Carolina and one convention in South Carolina. These meeting sites are listed on page 2 of this document. Following the 1964 convention in Greensboro, when the North Carolina Federation of Chapters was founded, conventions have been held each year at various sites in North Carolina as follows:

Year	Number	Host Chapter	City
1965	9	566	Durham
1966	10	105	Charlotte
1967	11	156	Asheville
1968	12	454	Winston-Salem
1969	13	192	Raleigh
1970	14	211	Greensboro
1971	15	214	Hendersonville
1972	16	105	Charlotte
1973	17	566	Durham
1974	18	1211	Boone
1975	19	276	Cape Fear - Fayetteville
1976	20	1005	Albemarle-Nags Head
1977	21	454	Winston-Salem
1978	22	337	Wilmington
1979	23	156	Asheville
1980	24	211	Greensboro
1981	25	105	Charlotte
1982	26	214	Hendersonville
1983	27	1420	Smoky Mountain
1984	28	192	Raleigh
1985	29	276	Cape Fear-Fayetteville
1986	30	454	Winston-Salem
1987	31	808	New Bern
1988	32	211	Greensboro
1989	33	1420	Smoky Mountain

Year	Number	Host Chapter	City
1990	34	105	Charlotte
1991	35	337	Wilmington
1992	36	156	Asheville
1993	37	192	Raleigh
1994	38	808	New Bern
1995	39	276	Cape Fear - Fayetteville
1996	40	211	Greensboro
1997	41	566	Durham
1998	42	105	Charlotte
1999	43	276	Fayetteville
2000	44	454	Winston-Salem/Clemmons
2001	45	156	Asheville - Lake Junaluska
2002	46	2206	First Flight - Kill Devil Hills
2003	47	781	Rocky Mount
2004	48	692	Hickory
2005	49	1895	Southern Pines
2006	50	156	Asheville
2007	51	1530, 804	Greenville
2008	52	566, 2108, 192	Chapel Hill
2009	53	105, 692	Hickory
2010	54	211,668, 454	Greensboro
2011	55	337,1312,1894,2226	Carolina Beach
2012	56	1420	Cherokee

When the 2012 North Carolina Federation of Chapters convention is completed, there will have been 56 annual conventions - 8 in the old Federation of the Carolinas and 48 in NCFOC.

Chapter(s)	City	Conventions Held
105	Charlotte	6
156	Asheville	6
211,668 &454	Greensboro	6
192	Raleigh	4
276	Cape Fear - Fayetteville	4
454	Winston-Salem	4
214	Hendersonville	3
566	Durham	3
337	Wilmington	2
808	New Bern	2
1420	Smoky Mountain	3
781	Rocky Mount	1
1005	Albemarle-Nags Head	1

Chapter(s)	City	Conventions Held
1211	Boone	1
2206	First Flight-Kill Devil Hills	1
121	Greenville, South Carolina	1
105 & 692	Hickory	2
1895	Southern Pines	1
192, 566 & 2108	Chapel Hill	1
1530	Greenville	1
337,1312,1894,2226	Carolina Beach	1

OBSERVATION: The typical convention of the North Carolina Federation of Chapters lasts for three days (it had been four days prior to 1997) beginning on Wednesday with delegates arriving and getting settled in their accommodations. A convention assembly with some initial business sessions is held that evening. A reception follows co-sponsored by Blue Cross/Blue Shield of North Carolina and the host chapter. The bulk of Federation business is accomplished Thursday with training or business sessions throughout the day. Recently conventions have had national NARFE representatives or speakers from the Office of Personnel Management or the Social Security Administration. Lunch is a working occasion followed by committee meetings. A banquet is held Thursday evening which includes a principal guest speaker, entertainment, presenting awards and election results are announced. On Friday morning a memorial service is held to honor all NCFOC deceased members, final business sessions are conducted, and reports of the various appointed committees are delivered. The convention normally concludes by noon.

The Twenty-First Century

As the NCFOC began the 21st century, it was clear to keep the Federation growing and thriving, NCFOC had to make a paradigm shift toward ideas of the future and advancing the use of technology. The elected officers in 2005 developed a Strategic Plan based on findings developed in coordination with chapters and members via Leadership Luncheons, Cluster Meetings, and addressing immediate NCFOC needs. These included membership recruitment and retention, better communications, education and training, website development and use of email and automation of Federation activities.

In developing the Strategic Plan, the following planning questions were raised:

- ❖ What has the Federation being doing well?
- ❖ What has the Federation being doing poorly?
- ❖ What organizational changes are needed to better accomplish Federation business?
- ❖ What is needed to improve National Headquarters' support of the Federation?
- ❖ How can communication between the Federation and the Chapters be improved?
- ❖ How can communications between the Chapters and the Federation be improved?
- ❖ What would be the effect on the Federation and Chapters of reestablishing "National Only" membership? What is your recommendation?

- ❖ If our Federation convention were to include educational workshops and programs designed to support Chapter needs, what workshops and programs would you recommend?
- ❖ What other issues or concerns do you want addressed?

Automation of Federation Activities

Using Internet tools and technologies to better serve the members of the North Carolina Federation of Chapters, the issue was placed in the hands of Webmasters Charles Pratt (Chapter 192) and Don Dailey (Chapter 2206). The automation process began in 2002 with a request from Area IV Vice President Thomas N. Hobgood (Chapter 192) to determine if there was a way to improve and reduce the time spent in the Federation's convention registration process. He asked if something could be completed for use at the 2003 convention at Rocky Mount. A Microsoft Visual Basic registration program was developed to meet the basic needs for the registration objectives set by Tom. The 2003 Convention Chair, Barbara Holden (Chapter 781), and the Convention Treasurer Lewis Thompson (Chapter 781) provided information about the names and type of registration they received so that those tasks normally performed on site could be completed beforehand. Included in the Visual Basic registration program were: attendee lists, banquet tickets purchased, name tags, badge holders, and ribbons.

The 2003-2005 Federation President Sarah Gonzales (Chapter 276) made two decisions that impacted the automation process. First, she asked if the registration process could be used at the next convention scheduled for Hickory in 2004. Second, following the 2005 Convention at Southern Pines, she wanted to update the Federation Website originally established by the immediate past Federation President Lillian Creger (Chapter 2211). She also created the appointed Board position of Website Coordinator and named Charles Pratt (Chapter 192) to the post. A temporary North Carolina website was in place January 2005 while the communications needs of the Federation and chapters were being assessed. At this time the integration of the convention registration process with the North Carolina website began.

In 2005 new Federation officers were elected. President Thomas N. Hobgood (Chapter 192), Executive Vice President Paul Carew (Chapter 2108), Federation Secretary Elaine Hughes (Chapter 156) and Federation Treasurer William "Bill" Ritchie (Chapter 105) began a major reassessment of the roles of chapters and the Federation. Paul Carew took the lead in the development of the Strategic Plan for NARFE in North Carolina. "Leadership Luncheon" meetings with chapter officers were held across the state to receive input into the development of a Strategic Plan. 2006 continued to be a busy year for those involved in the Strategic Plan because of the ongoing reassessment of how chapters and the Federation should interact. Evaluation included the review of conditions that led to undesirable outcomes like high dropout rates, lack of coordination, leadership recruitment problems, lack of funding, and communications problems. The following statement pointed to the major problems NARFE faced; "Without effective communication and challenging education and training programs, stabilizing or even growing our membership numbers will be difficult at best." Communications follow:

“The data from the Leadership Luncheons confirmed that communication is the backbone of a successful Federation and Chapter structure. At a time when NARFE is struggling with membership recruitment and retention; when smaller chapters are feeling isolated and left out of the mainstream; and, when chapters are not learning from each other about what works and what does not for important issues such as membership recruitment and retention, good communication is imperative”.

Specific attention was given to the Federation Newspaper, the Website and to Email communications. The 2006-2007 Strategic Plan Presentation is included for reference. The document denotes changes for the North Carolina Federation including those needed to improve the interaction between chapters and the Federation. More assistance was provided such as “Cluster Meetings,” technical workshops on retention, recruitment, service officer, secretarial and treasurer training, and increasing involvement in legislative actions. North Carolina’s efforts were directed at recruiting Current Federal Employees by expanding NARFE’s participation in “Pre Retirement Seminars” with Area V Vice President Paul Sams (Chapter 1895) taking the lead.

The 2006 Convention led to two additions to the automation process. The first was the automation of the Credentials process and the reporting systems. Convention Credentials Chair Robert Baker (Chapter 1999) asked if it would be possible to simplify the Credentials process which to this point was time consuming and fraught with errors. Chapter secretaries prepared individual credentials on multipart F-42 forms. One copy was sent to the Convention Credentials Chair for sorting. Changes had to be submitted in the same manner creating uncertainty for delegates. Other copies were sent to the Federation Secretary, chapter president and the delegate or alternate as appropriate. The automated online system requires no manual preparation of paper forms, just the entry of the delegate or alternate’s member number or first and last name in a box on the online form. A copy of the “Substitute F-42 Form” is provided by post to the delegate along with the registration confirmation. The chapter’s delegation list is available to chapter and Federation officers online and is updated each time a credential is entered, thus keeping the list current. As attendees arrive at the registration table, their registration packet and credentials’ ribbons are ready for pick-up and the online system is updated for the “Credentials Committee Report.” The Convention Attendance Report is prepared from the online data and is reported by the Convention Credentials Chair. Don Dailey (Chapter 2206) took on much of the programming for the credentials applications. His programming made the work of chapter secretaries easy and the job of managing credentials simple and efficient.

The second item coming from the 2006 Convention was the “Convention Planning Book” prepared by Convention Planning Chairs Sabine Dieringer (Chapter 156), Elaine Hughes Chapter President (Chapter 156) and the planning committee. This document has been used to guide all conventions following the 2006 Convention and is displayed on the website as a “Convention To Do List” that provides for and captures information for future convention planning committees.

Managing Convention expenses is always a challenge. The major expenses are (1) the hotel costs and (2) printing costs. The profitability of a convention often turns on the hotel cost which

is directly related to the contract with the hotel; the better the negotiations are with the hotel, the more profits are realized. The banquet menu and additional costs such as serving, setup costs and taxes may exceed the cost paid by the attendees for the banquet. The cost of guests and entertainers for meals are not often considered until after the meal price is set. The reception sponsored by Blue Cross/Blue Shield historically costs more than the contribution from the sponsor. These additional costs come from registration fees, contributions from chapters, and “Booster Book” ad sales. Problems with the 2007 Convention’s banquet service (not enough food was prepared to meet the guaranteed number of diners) provided the spark that led to the collection of hotel contracts and the development of an online budgeting and accounting module for the website. The online system provides continuous oversight of funding and expenditures on a real time basis and has helped the decision-making process

The automated accounting system module was added for the 2008 Convention in Chapel Hill. Convention Treasurer George Lemons (Chapter 192) was the first to use this new budgeting and accounting system. He provided valuable insights and recommended changes to make the system easier to understand. Bill Ritchie (Chapter 105), Treasurer for the 2009 Convention, and also the immediate past Federation Treasurer, recommended the Federation Treasurer become the designated Convention Treasurer to save the time and expenses to the host chapter setting up bank accounts, developing an accounting program and producing reports. If the information is available online, the planning committee has continuous access from anywhere. Thereafter, the Federation Board decided to have the Federation Treasurer function as Convention Treasurer. Federation Treasurer Sam Crain (Chapter 1420) has performed this duty admirably beginning with the 2009 Convention. The complete convention automated program was available for the 2010 Convention at Greensboro.

This convention provided additional planning information and the testing of a “Commuters Special” program for potential NARFE members with an interest in retirement issues, was presented by Planning Committee Co-Chairs Jerry Pifer (Chapter 211), Betty Whitten (Chapter 668) and Roger Quincoses (Chapter 454).

About this time a new set of National NARFE officers including Joseph Beaudoin – current National President, Paul Carew – National Vice President, Elaine Hughes – National Secretary, Bill Martin – Region X Vice President, and Paul Sams – North Carolina Federation President among others familiar with the automation used by the North Carolina Federation lobbied for the implementation of similar functionality for the National website. National President Joe Beaudoin appointed an advisory committee – National Information Technology Advisory Committee (NIAC), which presented its report at the Federation Presidents’ Meeting in Nevada. The NIAC recommendations are now being implemented by the Information Technology Division. One recommendation was the formation of a permanent Information Technology Overview Committee. The “Configuration Advisory Board” was established in November 2011 to oversee NARFE’s information needs. The North Carolina Federation has been well represented on these committees and continues to make an impact on information technology use at National.

The 2011 convention at Carolina Beach expanded the use of information technology by taking advantage of group meeting technology. To prepare for this convention, the Convention Chair and Chapter President L. Thomas Jennings (Chapter 337) spent the winter in Sun City, Arizona to research alternative methods to hold planning meetings. Participating in the planning meetings thereafter were Federation President Paul Sams (Chapter 1895), Executive Vice President Velma Geisert (Chapter 1895), Area V Vice President Lloyd Geisert (Chapter 1895), Chapter Presidents Robert Bartlett Chapter 1312), Julia Wheeler (Chapter 1894), Ruth Martin (Chapter 2266) and about a dozen committee members. The Federation ultimately secured the Go-To-Meeting software application for just such a purpose despite difficulties with geographic and travel distance challenges.

In the fall of 2011, “meeting” technology was again used to support the Triad Chapters’ delivery of a presentation from National NARFE Headquarters by Dan Adcock, NARFE’s Legislative Director and an introduction by National Vice President Paul Carew (Chapter 2108) to a joint meeting of the Greensboro, Winston-Salem and High Point Chapters. The Federation provides access to this technology for all chapters to facilitate the presentation of program, training, and committee activities.

Based on the data and feedback from these questions, a Strategic Plan was published in 2006. Through the period of this Strategic Plan, the NFOC rededicated the organization to further the goals of NARFE by striving to strengthen the Chapters and their membership. Marked progress has been made and is continuing and ongoing. Membership and retention is the number one priority of the Strategic Plan and will continue to take primary focus. The current Executive Board is in the process of developing a Strategic Plan for Recruitment and Retention. If we do not or cannot find ways to increase our membership numbers, we will cease to be a viable organization.

E-NARFE

In 2011 NARFE Headquarters created an on-line option as an alternative to the “traditional” NARFE Chapter. It is chapter 2363 and includes all the privileges of membership without the traditional chapter affiliation. The award winning magazine will still be mailed to members monthly, but all other correspondence will be sent by email. Members will have exclusive access to the NARFE blog, which is a virtual gathering place for discussion with peers. Membership dues will be \$40.00 per year. The North Carolina Federation of Chapters supports this initiative and is pleased to report that there are already about 2000 members in this chapter. Participation and registration for membership applications are on line at the NARFE national website.

Alzheimer’s Research

Since 1985, NARFE and the Alzheimer’s Association have partnered to achieve the association’s vision of a world without Alzheimer’s disease. Through the hard work and dedication of NARFE’s members to the Alzheimer’s Association’s International Research Grant Program, we continue to make progress toward finding a treatment, prevention and an eventual cure for Alzheimer’s disease.

North Carolina's NARFE members have played a vital role in the fight against this devastating disease. Since the beginning of the relationship over 25 years ago, NARFE members nationwide have contributed nearly \$9 million to the NARFE Alzheimer's fund. North Carolina has almost always been within the top three states with its contributions. This is an accomplishment that we can be proud of, and we cannot express enough thanks to our members for their longtime generosity and support. We certainly hope to continue well into the future until a cure for Alzheimer's disease is a reality.

NARFE-PAC

NARFE-PAC is a political action committee that works for all NARFE members for the sole purpose of protecting the earned benefits of individuals with a vested interest in the civilian retirement systems of the Federal government. NARFE-PAC is one of the most democratic PACs in the country. Each state has a NARFE-PAC Coordinator designated by the Federation President. The NARFE-PAC Coordinator is advised of and has an opportunity to comment on each request for PAC contributions from candidates for his or his state. The four elected national officers, in coordination with the Legislative Staff, make the final decision on which candidates for the House and Senate will receive NARFE-PAC funds. Decisions are based on the overall support candidate's display toward NARFE's agenda. The North Carolina Federation actively participates in and is always given full consideration in the decision-making process. While NARFE-PAC contributions are strongly encouraged, they are strictly voluntary, and are not tax deductible. Chapter or Federation funds are not permitted to be used as contributions to NARFE-PAC. As with all PACs, the NARFE-PAC complies with all the rules of the Federal Election Commission and the Internal Revenue Code.

Legislative Initiatives and Activities

NARFE members spend a tremendous amount of time and effort in defending and protecting the retirement and health benefits of current federal employees and retirees. For several years the emphasis has been focused on the repeal of the social security offsets, the Windfall Elimination Provision and the Government Pension Offset, as well as Premium Conversion. Numerous threats and fears have risen recently with the congressional proposals and the threats regarding the erosion of our earned benefits. The focus now is on trying to retain the benefits that we currently enjoy as well as trying to debunk the myths that abound about the image and pay of Federal workers and retirees. More emphasis is also placed on the current employees and their future benefits. The deficit crisis is a big challenge, and we need to try to keep Federal employees and retirees out of this fray if possible. We did not cause the crisis, and we do not want to become the "scapegoats" or have our benefits cut to balance the budget or to solve the deficit crisis. We need to focus on a "shared sacrifice" approach in which everyone participates in the cuts.

Membership

Membership is the biggest challenge facing NARFE today. Loss of membership could threaten the very existence of NARFE. The principal problem facing NARFE is retaining current members. Our membership is aging and new retirees are not joiners. In 2006, consistent with the Strategic Plan, Tom Hobgood recommended to the Federation Executive Board that a Membership Coordinator be appointed. The Federation Executive Board approved the appointment of Theron Rumsey to that position. Theron has provided expert advice and support to the Federation and to the chapters on membership and retention since that time and has initiated some awards to chapters for their recruitment and retention efforts. He provides monthly reports and updates as needed, tracks trends, and keeps everyone apprised of our strengths and weaknesses, as well as our progress.

The North Carolina Federation of Chapters Executive Board has just developed the 2011-2012 Retention and Action Plan and a 2011-2012 Recruitment Plan. These action plans are being implemented and hopefully will help with this difficult problem which presents no easy solutions. Retention of members is critical for the survival of NARFE. Recruitment and Retention must work together to build and maintain NARFE. Retention is important for providing a source of leadership and sustained energy. Let this “elicit a call to action” on the part of everyone in the organization. Every member is an asset and gives us the clout to carry out our legislative agenda. Every member needs to assist in the recruitment and retention of our members.

Appendix 1 – Resumes of Past NCFOC Presidents

Charles L. Alexander - President 1984-1986

- ❖ Born November 13, 1921, married to Ruby M. Alexander with two children and three grandchildren.
- ❖ Retired from US Postal Service in 1977. Was appointed as Postmaster in Kings Mountain in 1956.
- ❖ After graduating from High School, attended Blanton's Business College in Asheville, NC.
- ❖ Served three and a half years in the US Navy during World War II.
- ❖ Was Chapter President of NARFE Chapter 1785, Shelby, NC; served two years as Area II Vice President, two years as Federation Vice President and two years as Federation President. He is deceased.

Elsie M. Parker - President 1986-1988 and 1994-1995

Elsie M. Parker was born in Spring Hope, North Carolina. She attended Spring Hope High School and East Carolina University. During her federal civil service career which began in 1940, Elsie worked for the Farm Security Administration; Nash County Health Service; Office of the Registrar, US Army; Personnel Manager for the Army/Air Force Exchange Service as a Position Classifier; and, from 1950, she was an Assistant Supervisor of the Position and Pay Management Division, Personnel Office, Civil Service Commission, US Army, XVIII Airborne Corps and Fort Bragg, Ft Bragg, NC. She retired from Civil Service with 38 years of service. She continued to work with various retirement groups and civic organizations. Prior to being elected President, she served NCFOC as Vice President and President of Cape Fear Chapter 276, Area V Vice President, and Federation Vice-President. She also served on national association committees for Logistics, Credentials, and Balloting and has been coordinator of various projects. She continued to serve NARFE as Public Relations Officer for decades. Elsie remained actively involved until her death in 2005

"Alex" Bourdas - President 1988-1990

"Alex" Bourdas was born of immigrant parents on February 11, 1918 in New York City. His family migrated to North Carolina and settled in Kinston, where his father was in the restaurant business. "Alex" was reared in Kinston and received his high school education there. He is a federal retiree from the US Postal Service where he held numerous positions and finalized his career with over 33 years service in November 1979.

Prior to World War II, he was employed with the Railway Express Agency in Kinston as a clerk. He was inducted into the US Army and served in the European Theater of Operations during WW II with the 13th Armored Division of the 3d Army. After the war, Alex returned to his original employment and transferred back to Kinston. In 1948, he took a civil service examination and was given an appointment with the Kinston Post Office. While employed with the Post Office, he joined the North Carolina National Guard as a Master Sergeant. He served

Appendix 1 – Resumes of Past NCFOC Presidents (cont'd)

"Alex" Bourdas - President 1988-1990 (cont'd)

with them for 15 years and attained the rank of Chief Warrant Officer Four (CWO-4). He then transferred to the US Army Reserve and served for an additional 14 years before he retired from the Army of the United States with over 31 years service at the CWO-4 grade on February 11, 1978. During his 33 years of federal service with the USPS, he held many leadership positions. After he retired, he joined NARFE and helped to organize a chapter in Kinston, where he served as its first president. In May 1984, he was elected Federation treasurer and served for four years until he was elected Federation president in 1988. He was a member of many organizations: his church, VFW, American Legion, the Golden-K of Kiwanis International, Masons, Shriner and NARFE. He was married to the former Edna G. Sutton of Kinston since June 20, 1938. They have one son, two daughters, and four grandchildren. He died in Kinston in 2001.

Milton Quinn - President 1990-1992

Milt Quinn was born and raised in Jefferson County, Tennessee and lived there until he entered the US Navy in March 1944. He spent most of his US Navy service at the Norfolk Naval Air Station. Upon his discharge, he worked for the Naval Overhaul and Repair Department at Norfolk as an aviation electrician until the early 1950s when he moved into the industrial/management engineering field. He transferred to the Air Systems Command Representative Office in 1959 and stayed there in various positions until his retirement. After his retirement, he spent the next seven years as an engineer with the Cerberonics Corporation as a DOD consultant. He lived in the Norfolk, VA area during his entire working career, almost 40 years. Upon retirement, Milt and his wife, Starr, relocated to the mountains of North Carolina. They moved to Transylvania County and maintain their residence there. He has been the pastor of his local church for two years, eight years as Chairman of the County Transportation Committee and four years as an elected County Commissioner. He was a member of the "Senior Tar Heel Legislature" when it was organized in North Carolina in 1994. Milt first became a member of NARFE Chapter 1999 in Brevard and served in various offices there. He was Area I Vice President and North Carolina Federation Vice President. He was elected NC Federation President in 1990 and reelected in 1991. In 1992-93, he was a member of the NARFE HQ Management Review Advisory Committee. He chaired the National Convention Resolutions Committee in both 1992 and 1994. In 1996, he was elected National Field Vice President of Region X. Mr. Quinn continues to be an active member of Chapter 1999 Brevard.

Edmund Bromley - President 1992-1994

Ed Bromley was born in Watervliet, NY. He graduated from New York State College for Teachers (SUNY at Albany) in 1938. He taught high school science and coached baseball; then he met his future wife, obtained a private pilot license and, in 1941, was drafted into the US Army. He was in the Army Air Corps and had assignments as a Link Trainer Instructor at Turner

Appendix 1 – Resumes of Past NCFOC Presidents (cont'd)

Edmund Bromley - President 1992-1994 (cont'd)

Field, Albany, GA. He then went to California Institute of Technology in Pasadena to study meteorology. He was assigned to Alaska, had a stint in Guam and then a tour of duty in China. After WW II, Ed took a job as meteorologist for Pan American World Airways in Seattle WA. Shortly thereafter, he began his civil service career as a meteorologist assigned to the Weather Service until 1957 when he was transferred to the Research and Development Activities of the US Air Force in Baltimore and at Andrews Air Base, MD.

In 1960, Mr. Bromley transferred to the Federal Aviation Administration (FAA) in Washington, DC and served as planning officer, manager of the data acquisition R&D program, branch chief of support systems of the weather and flight service stations branch, and as deputy division chief of the airport division within the FAA Research and Development Service.

He received the US Air Force Meritorious Service Civilian award on two occasions and the Distinguished Career Service Award from the FAA. He retired from government service in 1980 in Corvallis, OR. His wife, Helen, contracted multiple sclerosis in her late forties and died in December 1982 in Corvallis. Ed moved to Greensboro in May 1990 and is a member of NARFE Greensboro Chapter 214 and had been an officer in the Oregon NARFE Federation prior to moving to North Carolina. He was elected to the office of Vice President of the NCFOC in May 1991 and to President in May 1992 and served for two years. He is deceased.

Fain Hambright - President 1995-1997

Fain Hambright was born and raised in Grover, NC. He graduated from Grover High School and Kings Business College before serving in the US Air Force as a paramedic between 1950 and 1954. He was Postmaster at Grover for 31 years and also worked in the Carolina District Office, was Officer-in-Charge at Hendersonville, and served on various task forces of the US Postal Service. He held several important positions, including NC State President and National President, in the Postal League. Fain and his wife, the former Carolyn Dedmon, were married in 1955. They have three children and five grandchildren.

Both Fain and Carolyn retired from the US Postal Service August 31, 1992. Fain had 37 years of military and postal service and Carolyn had 28 years of service. Fain became a Life Member of NARFE in 1983 and served as President of the Piedmont/Shelby Chapter 1785 in 1993 and 1994, as NCFOC Vice President 1994 and 1995 and finally as President of NCFOC during the years 1995-1997. He continued to serve NARFE as a former PAC coordinator and as the email NET coordinator for several years. Fain died on November 9, 2007.

Appendix 1 – Resumes of Past NCFOC Presidents (cont'd)

Lyle V. Storch – President 1997-1999

Lyle Storch served in the US Army from 1946-1949 in Berlin, Germany as a Radio Repairman and then served in the US Air Force Air Training Command from 1950-1954 as an Electronic Instructor. His civilian service with the Department of Defense started as an Electronic Instructor at Scott Field, Illinois in 1955 and ended 1960 at Keesler Field, Mississippi. He then transferred to the Federal Aviation Agency at Valdosta, Georgia in 1960 as an electronic technician. He was promoted as a Supervisory Electronic Technician and moved to New Bern, NC in 1975. He was again promoted and transferred to Raleigh-Durham in 1977 where he served as Proficiency Development and Evaluation Officer and Program Support Manager for the FAA in North Carolina. He retired from the FAA in January 1984 with almost 36 years service.

Lyle was very active in affairs of older adults: President of the Council for Senior Citizens in Durham County, member of the Triangle J Council of the Aging Advisory Council and was involved in the planning for the Senior Center in Durham.

Lyle joined NARFE in 1990 and served as President of Durham Chapter 566 in 1991 and 1992. He was appointed Area IV Vice President in 1992 and was elected to that position in 1993. He was appointed to the vacancy of Federation Executive Vice President in 1995 and then was elected to that post in 1996. He served as NCFOC President from 1997-1999. An award named in his honor is still a vital part of the NCFOC convention events. See Appendix 4.

Lyle and his wife, the former Wanda Russell, had two children and five grandchildren; they were married 49 years when he died in Durham in late July 2001. Wanda is still an active member in the Durham Chapter 0566.

Bill Austin - President 1999-2001

Bill Austin was born in Charlotte, NC in 1938. He graduated from Central High School in 1957 and then served three years in the US Army. In 1960, he began his long career in the US Postal Service. He was married in 1960 and he and his wife have two daughters. During his career in the USPS, he was promoted to positions of increasing levels of responsibility in cities throughout the nation. His expertise included Customer Services and Operation Budgets in the multi-billion dollar range. He obtained an Associate Degree in Business Management in 1973 and then graduated cum laude from Winston-Salem State University in 1997 with a BS degree in Political Science. He also attended Graduate Studies at the Colgate Darden School of Management at the University of Virginia as part of his responsibilities with the USPS.

He became a NARFE member in 1994 and attended national conventions in Houston, Orlando, and San Diego. He held chapter positions of vice-president and president and also held Federation positions of Service Officer, Executive Vice-President and President. He made a strong but unsuccessful run for the office of NARFE National Secretary in 2000. He remained

Appendix 1 – Resumes of Past NCFOC Presidents (cont'd)

Bill Austin - President 1999-2001 (cont'd)

active in the North Carolina Federation as immediate past President and as Service Officer in 2001-2002. At the 2002 National Convention in Greensboro, NC, Bill was elected to the office of Region X Vice President and served in that position for four years. He ran and was elected to the National Executive Vice President in 2006. He resigned for personal family reasons in 2007. Bill is still very active in his Charlotte 105 chapter.

Lillian A. Creger – President 2001-2003

Lillian retired from Marine Corps Air Station, Cherry Point, N.C. as a Financial Systems Analyst for the Comptroller Directorate. She was given an early out with 28 years of service due to consolidation of functions within the Comptroller's Office.

She joined NARFE in 1993 and became an active member of Chapter 2211 in December 1994 when she was elected to the Chapter's Presidency for 1995 and 1996. In May of 1997 she ran for Area VI VP and held the office for two terms. In May of 1999 she ran and was elected to Federation Executive Vice President for two terms. At the 2001 State convention she ran and was elected as the Federation President and held the office for two terms.

Lillian says she was proud to serve as the NARFE Federation President and always worked for the members of the state. The position enabled her to touch the lives of many fine people and make friends from all over the state, and for this she will be forever grateful. She stays in touch with legislators both at the National and State level and travels frequently. Lillian recently started gardening for the first time in her life and is enjoying herself in this new hobby.

Sarah Gonzales – President 2003-2005

Sarah retired from AC of S Resource Management, Fort Bragg, NC in 1988 as Administrative Officer. She has also worked as Chief, Telephone Operations in the Panama Canal Zone for six years. She became a NARFE member in 1996, serving as Vice President, Cape Fear Chapter 276, and Federation secretary for four years and Federation Executive Vice President for two years. She was the Chairperson of the Federation Convention in 1999 and the National Convention held in Greensboro in 2002. She was elected Federation President in 2003 and served two terms in this position. Sarah remains active in her chapter and attends most Federation Conventions. Sarah has 5 children, four of whom are NARFE members.

Thomas N. Hobgood – President 2005-2007

Tom retired from the College of Agriculture and Life Sciences, North Carolina State University after serving 37 years as a member of the Cooperative Extension Service. In this position he had the opportunity to serve at the county, district, and state levels. Tom is also a

Appendix 1 – Resumes of Past NCFOC Presidents (cont’d)

Thomas N. Hobgood – President 2005-2007 (cont’d)

veteran with brief service at the end of World War II and a two-year tour of duty during the Korean Conflict. Tom earned a B.S and a Master’s Degree from North Carolina State University and a PhD from Florida State University.

Tom joined NARFE in 1992 and became an active member in the Raleigh Chapter and after serving as Vice President for one year, was elected President in 1997 and 1998. He also served as National and State Legislative Officer and NARFE-PAC Chair as well as a member or chair of other chapter committees. At the 1999 state convention in Fayetteville, Tom was elected Vice President of Area IV Vice President and continued in this position for 5 years. In 2005 Tom was elected President of the NC Federation of Chapters and served for two terms. Tom served as a delegate at the last 16 state conventions and 6 national conventions: Orlando, Greensboro, Reno, Louisville, Albuquerque and Grand Rapids. He has also served as the Legislative Contact Officer and has attended 6 National Legislative Conferences.

Tom is a past winner of both the Lyle V. Storch Award and the Charles R. Patton “Good Egg” Award. Tom is currently serving on the Federation Executive Board as the NARFE-PAC Chair and is the District 4 Legislative Contact Officer. He is also very active in his local Chapter Raleigh 192.

Paul H. Carew – President 2006-2007

Paul retired from the Department of Defense in Washington after 38 years of service. He held senior level positions and was a charter member of the Senior Executive Service. Paul is a veteran and served during the Korean Conflict. Paul earned a B.A. in Political Science from Monmouth University and a Masters and Doctorate in Public Administration from the University of Southern California.

He joined NARFE in 1994 in Maryland while still an active Federal employee and transferred to Chapter 2108 Chapel Hill in 1997 when he retired. He served as First Vice President for two years, President for four years and Newsletter Editor for four years. Paul served as a delegate to the Federation Convention for several years and chaired the Budget Committee in 2003. In 2005, Paul was elected Federation Executive Vice President and served for two terms. He then was elected President in 2007. At the 2008 National Convention in Louisville he was elected Region X Vice President.

At the 2010 National Convention in Grand Rapids Paul was elected National Vice President. He and lovely wife, Amelia, now live and serve us from National NARFE Headquarters in Washington, DC. Let’s hope that Paul will continue to excel in his work with NARFE, meet his goals, and return to North Carolina.

Appendix 1 – Resumes of Past NCFOC Presidents (cont'd)

Elaine Hughes – President 2008–2010

Elaine retired in 1995 ending a 30-year Federal career where she held positions with the Office of the Air Force Surgeon General, the President's Air and Water Quality Boards, Environmental Protection Agency, and an Energy Conservation Specialist with the US Department of Energy.

Elaine graduated from Hagerstown Business College and attended George Washington University and the University of Maryland majoring in Business and Public Administration. She joined NARFE in 1996 in Asheville serving as Chapter First Vice President for two years, Chapter President for two years, Federation Secretary for two years, Federation Executive Vice President for one year and Federation President for two years. She co-chaired the 2006 Federation Convention Committee, attended the last five conventions and served on several convention committees including National/State and Bylaws Resolutions.

Elaine served a Board Member of the Federal Retiree's Task Force of North Carolina that was created to work with the 4th Branch to protect, advocate, and advance the interest of retirees and senior citizens. The main focus is to extend the Emory/Bailey/Patton benefits to current federal and state retirees who were not covered in the last legislation.

At the 2010 National NARFE Convention in Grand Rapids, Elaine was elected to the NARFE National Secretary position. When she has finished her tenure in Washington, Elaine plans to return to Asheville, North Carolina.

Paul Sams – President 2010- 2012

Paul retired from the US Postal Service in 1992 after a career lasting 33 years. He began in 1959 in the Old Railway Mail System as a mail clerk, worked up to carrier, customer service representative, program analyst, program manager and then went into the Executive Program as Division Director of Marketing and Communications in 1986. In 1989 he was promoted to Regional Director of Marketing and Communications and retired from this position.

Paul was born in Greensboro, NC in 1938 and lived there until 1977. He grew up in Revolution, a mill village area of Cone Mills, attended Caesar Cone, Proximity, and Greensboro senior high schools. He lived there until 1959 when he married his high school sweetheart, Judith Kendrick. They have one daughter and three granddaughters who are very special to them.

Paul has extensive experience in many NARFE areas. He served at all levels in his chapter, Area V VP, Legislative Contact Officer, Executive VP of the Federation for two terms and Federation President for two terms. Paul is currently serving as the Director of the Federal Retiree Task Force of North Carolina, is very active in his own chapter while also serving as the Federation President of North Carolina.

Appendix 2 -North Carolina NARFE Chapters as of 2012

<u>Number</u>	<u>Name</u>	<u>Area</u>	<u>Number</u>	<u>Name</u>	<u>Area</u>
0105	Charlotte	II	1420	Smoky Mountain	I
0156	Charles R. Patton	I	1530	Pitt County	VI
0192	Raleigh	IV	1611	Surry-Yadkin	III
0211	Greensboro	III	1752	Statesville	II
0214	Hendersonville	I	1791	Piedmont-Gastonia	II
0276	Cape Fear	V	1830	Wayne County	IV
0337	SENCLand	V	1894	Brunswick County	V
0454	Winston-Salem	III	1895	Sandhills	V
0566	Durham	IV	1904	Lumber River	V
0667	Marion	I	1983	Lincoln County	II
0668	High Point	III	1999	Marjorie Christie	I
0692	Hickory	II	2046	Sampson-Duplin	V
0696	Burke County	I	2047	Harnett County	V
0720	Salisbury	II	2107	Johnston County	IV
0781	Rocky Mount	IV	2108	Pearl S. Wright-Chapel Hill	IV
0800	Ashe-Alleghany	III	2206	First Flight	VI
0804	Washington	VI	2209	Carolina Mountain	I
0808	New Bern	VI	2211	Havelock-Cherry Point	VI
0826	Sanford	V	2245	Alamance	IV
0979	Wilkes	III	2266	Intracoastal	V
1005	Albemarle	VI	2269	Mount Airy	III
1009	Cabarrus	II	2289	Henderson	IV
1161	Rockingham Co.	III	2295	Person-Caswell	IV
1199	Wilson	IV	2297	Roanoke Valley	IV
1211	Boone	III	2316	Stanley County	II
1312	Coastal	V			

Appendix 3 - North Carolina Federation Executive Board 2011-2012

Elected Officers

President: Paul E. Sams

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Appendix 3 - North Carolina Federation Executive Board 2011-2012 (cont'd)

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Appendix 3 - North Carolina Federation Executive Board 2011-2012 (cont'd)

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Appendix 4 - NCFOC Involvement in Tax Case Organizations - 1986 to 2012

A significant portion of the recent history of the North Carolina Federation of Chapters is embedded in certain leaders of the Federation becoming involved in tax case organizations in North Carolina. Almost fifty other organizations were involved with NARFE in forming coalitions against the state of North Carolina to get illegal taxes returned to government retirees at the local, state and federal levels.

One of these organizations was the North Carolina Coalition for Legislative Action. It was formed after retirees felt they were not being treated fairly by the state of North Carolina. It had its genesis in 1979 and was formed in 1986 by a group of civil service, many NARFE leaders, and military retirees who believed recovery of illegally taken state income taxes could occur with court action. In 1989 a law firm agreed to represent the coalition on a contingency fee basis. Also, in 1989, the Tax Equity Task Force was formed to represent the needs of retirees. As the tax case issue worked its way through the courts, the 4th Branch was formed in 1995. Eventually, in 1998, the State legislature and the governor jointly approved an appropriation to refund the state income tax to eligible federal, state and local government employees.

Many NARFE members, especially officers of the NC Federation of Chapters who served in the 1980s and 1990s, assisted in the administration of these various coalitions for legislative action. They stepped forward and devoted many years of effort to get tax relief for all government employees and retirees. Leaders of NARFE and the NC Federation of Chapters know that our organizations must operate as a non-partisan political entity. In order to get legislative action at the highest levels of state government, it was necessary that organizations serving government retirees work together for a common cause.

The actions of NARFE members in North Carolina are important examples of how legislative action can be accomplished by people who are dedicated to getting actions done. They successfully lobbied not only the General Assembly but also the executive branch of the government to accomplish goals for the common good. When we use these examples of how certain members of NARFE worked in a very dedicated way for more than 15 years, we can apply some of the "lessons learned" for *The 4th Branch*.

History and Background of *The 4th Branch*

The 4th Branch was formed in the summer of 1995. It was created as a "Coalition" of retiree organizations that were already working toward improving benefits for their members, including equal tax treatment by the state. Prior issues prompted its formation: the United States Supreme Court decision, known as Davis vs. Michigan, issued on March 28, 1989, declaring illegal state income tax schemes (systems) that tax the annuity of federal retirees and not state retirees, triggered activity in 28 states throughout the nation. In North Carolina, on August 12, 1989, the General Assembly enacted legislation that imposed state income tax on the annuities of state retirees. Before then, state retirees were exempted from state income taxes on their annuities.

Appendix 4 - NCFOC Involvement in Tax Case Organizations - 1986 to 2012 (cont'd)

Early in the struggle to achieve fair and equitable tax treatment for all government retirees, it became clear that efforts on behalf of this large group would be severely diminished if they were not pulling together. Opposition would certainly try to “divide & conquer.” In mid1995, leading retiree members got together and formed *The 4th Branch*. This organization was not intended to diminish in any way the efforts of the numerous government retiree organizations already working toward improving benefits for their members. *The 4th Branch* simply became a coalition of retiree organizations with a stated purpose of serving as an information highway.

This “Coalition” provided valuable assistance in the effort to negotiate a reasonable settlement with the State following the North Carolina Supreme Court decision in the Bailey/Emery/Patton case. It further served to monitor and support the lengthy settlement process following the successful negotiation. During each of the frequent court hearings to review progress of the settlement, many *4th Branch* representatives attended. This showing of support was a key factor in demonstrating to the court the extent to which this large and diverse group was united behind this effort. Following each court hearing, *The 4th Branch* met, heard detailed reports and held discussions on behalf of the represented organizations.

The 4th Branch was incorporated in the State of North Carolina on November 28, 2000 and was granted non-profit status by the IRS as a 501-c (5) organization. In May 2002 Superior Court Judge Jack A. Thompson awarded residual funds from the case to *The 4th Branch* - the only organization representing all claimants in the Bailey Settlement. *The 4th Branch* continues to be active with quarterly meetings. The leadership structure includes co-chairs: one represents state and local government retirees and the other represents federal and military retirees. It does have program objectives and committees are created and dissolved as needed.

The Fourth Branch's Statement of Policy: the purposes of *The 4th Branch* will be carried out by enlightening members through their organization leadership with respect to:

1. Background, facts, statistics, status of proposed legislation and other government actions.
2. Which incumbents and candidates are friendly to retirement groups and which are not.
3. Actions taken (or not taken) by elected representatives that may impact on our constituent members.
4. General information helpful to all Government Retirees and Vested Employees to enable them to make their own voting decisions with full knowledge of the consequences.

The 4th Branch SHALL NOT:

1. Function as a Political Action Committee (PAC).
2. Specifically endorse any candidate for public office.
3. Dictate to organizations or their members how to vote or who to support.
4. Solicit or proselytize members of any organization.
5. Attempt to diminish the authority of the Officers and Directors of our member organizations or interfere in any way with their respective Missions.

Appendix 4 - NCFOC Involvement in Tax Case Organizations - 1986 to 2012 (cont'd)

Extending *The Bailey-Patton Settlement*

The *Bailey-Patton Settlement* applied only to those who had five or more years of creditable service toward retirement as of August 12, 1989. This meant that any government employee (local, state, military or civil service), who did not meet this criteria, would not qualify for the state tax exclusion. *The 4th Branch*, at a meeting several years ago voted unanimously to take on the task of convincing the State General Assembly to enact legislation to correct this inequity. The process began with the introduction of bills in the House and Senate entitled "Equal Tax Treatment of Government Retiree Benefits."

Recognizing that legislators would be reluctant to support a bill that could be viewed as a loss in revenue, it was believed that exempting retiree annuities from state income taxes had a positive side. To support this contention, a study was commissioned by *The 4th Branch* and the Federal Retiree Task Force. Results of this study were published in a booklet entitled "Investing in North Carolina's Future: The Positive Impact of Extending the Bailey Settlement to All Government Employees." It showed, among other benefits, in the multiplier analysis that for every one dollar cost to the state, there would be \$2.50 in returned benefits. Copies of the published materials were distributed to all members of the General Assembly at the beginning of the 2008-2009 session. Although we were not successful in that session, we began to prepare for the 2010-2011 session. Given that the data in the study is three years old, the decision was made to update, republish and redistribute copies of the study to members of the General Assembly. This was accomplished in the beginning of the "Long Session." Plans are to continue our work in the "Short Session." The current climate is questionable with the state dealing with financial shortfalls; however, it is the belief of those involved that the economy will improve, and we should continue to push forward. Much effort has been spent by representatives on *The 4th Branch* Board of Directors and its Legislative Committee; important future legislative actions must be taken in the 21st century.

Federal Retiree Task Force of North Carolina

The purpose of this organization is to further the long term interests of all military and civilian retirees and their beneficiaries, residing in North Carolina; to communicate with and advise them of their rights and obligations; to use such lawful efforts including legislative activities as needed to accomplish this purpose in a nonpartisan manner. Membership in the Task Force is open to all federal and civilian retirees and their spouses who reside in North Carolina. Active members are those who make a voluntary contribution to support the work of the Federal Retiree Task Force and are therefore eligible to receive information on the activities of the group who worked long and hard from 1989 to 1998 when the NC State Supreme Court decided that the Bailey/Emory/Patton Case was valid and decided to exempt this group from paying state income tax on their annuities. The Task Force is still alive and well and is working with other organizations such as NARFE, MOAA, The Sergeants Association, The U. S. Postal Service, and The 4th Branch to extend the tax exemption to new retirees who were not vested by August 12, 1984, and who are just beginning to reach retirement age.

Appendix 5 – Lyle V. Storch Award

This award was established to honor the memory of Lyle V. Storch and is an annual part of the North Carolina Federation Recognition Program.

Lyle V. Storch, who lived in Durham, NC, was an ardent member of the National Active and Retired Federal Employees (NARFE) and worked tirelessly at all levels of city, county and state government for those issues he felt strongly about. Yet, only a few knew of his efforts outside of his family, friends, and associates. He worked effectively behind the scene and on the stage. The few examples noted below outline how he made a difference in his community, area, state, and other organizations he served along with NARFE.

While no formal criteria exists for selecting a candidate from the nominees for this award, the nomination form uses the example set by Lyle V. Storch as a guide in the selection process. “Service to NARFE and the member’s local community will be considered in the selection process”.

The City of Durham was fortunate to have him as a citizen, as well as serving its citizens. He was a member of the Council for Senior Citizens, taught defensive driving for AARP and worked to establish the Center for Seniors in Durham. He served on many boards and committees in and around the Research Triangle Area and North Carolina, including the Triangle J. Council of Governments’ Aging Advisory Committee and the state Attorney General’s Senior Fraud Task Force.

As a young man, he served his nation through military service, first serving in the Army during the Berlin Air Lift and then transferring to the Air Force. His military experience led to a civilian career with the Federal Aviation Administration.

His passion for fairness and openness in government put him at the center of the Bailey Settlement action. He worked tirelessly lobbying the state legislature and generating grassroots support for tax equality. Eventually, the court directed settlement returned illegally collected state income taxes on the annuities of many retired federal employees in North Carolina. His NARFE service included serving as Durham’s Chapter 0566 President, NC Federation of Chapters Executive Vice President and President.

Lyle Storch’s consistent work on behalf of state, local, and organizational issues and concerns confirmed his commitment and also reinforced his “can do and will do” attitude that is so necessary to getting things done.

The following individuals received the Lyle V. Storch Award:

2002 – William Cannon, Fayetteville – Chapter 276

2003 – Kenneth Strawberry, Wilmington – Chapter 0337

2004 – Clarence Burrell, Smoky Mountain – Chapter 1420

Appendix 5 – Lyle V. Storch Award (cont'd)

- 2004 – Charles Pratt, Raleigh – Chapter 0192
- 2005 – Julian Oliver, Henderson – Chapter 2289
- 2006 – Milton H. Quinn, Brevard – Chapter 1999
- 2007 – Inez R. Angus, Clyde – Chapter 1420
- 2008 – Barbara Holden, Rocky Mount – Chapter 0781
- 2009 – Thomas N. Hobgood, Raleigh – Chapter 0192
- 2010 – Paul H. Carew, Chapel Hill – Chapter 2108
- 2011 --Robert F. Bartlett, Coastal – Chapter 1312

Appendix 6 – The “Good Egg Forum” (Charles R. Patton “Good Egg” Award)

The Good Egg Forum originated at the 28th Federation Convention in 1984 in Raleigh. The idea originated with Charles Lehning to bring together the leaders within the Federation who were motivators. In effect, it was proposed as a "Kitchen Cabinet" for the Federation President to further the discussion of ideas in the interest of Federation retirees and employees.

The membership would be by invitation only by the initial nucleus. The membership would not be restricted to Federation officers but would be open to any Federation member who had made a sustaining contribution to the Federation, chapter and members. As members were invited to join, they were recognized with a "Good Egg Plaque." There would be no formal organization in order that each member would be free to bring before the body any subject matter that he/she thought of sufficient importance to be considered. Members would not be designated by their official position in the Federation and would carry no portfolio into the meetings. The charter members were:

- Charles Alexander, Federation President
- Elsie M. Parker, Federation Vice President
- George Sabo, National Legislative Officer
- Walter H. Fuller, State Legislative Officer
- Charles Lehning, Editor

The concept of the forum was presented at the 1984 August Federation Board meeting in Greensboro and was accepted by a majority of the board members present. The contingent that abstained or voted against the proposal put forth the basic argument that this could come to be viewed as a "select group" subverting the elected officers and would detract from the main purpose of the convention. It was proposed that the membership would consist of those with "high moral standards, impeccable integrity and an unswerving interest in serving the Federation membership." The forum members would provide assistance to Federation and chapter officers in furthering the goals of the Federation in providing guidance to form new chapters and serving the Federation in the same capacity as NARFE served the national interest.

The charter members voted in an executive session to appoint Charles Lehning as the first Executive Director with the responsibilities of maintaining the history files, plan for the meeting of the forum at Federation conventions, coordinate with members as to the subject matter to be discussed and form work groups as needed. The first working session was at the Greensboro board meeting with Area Vice- Presidents. The purpose was to develop and plan for the formation of additional chapters and develop procedures to work with candidates for Congress and the State General Assembly.

In 2010, the North Carolina Federation Board voted to make the “Good Egg Award” a Federation Recognition Program. The Board also voted to name the award in memory of and in recognition of Charles R. Patton for the many contributions he made as an active member of the North Carolina Federation. The award is to be presented annually at the State Convention to a NARFE member who has made exemplary contributions to NARFE.

Appendix 6 – The “Good Egg Forum” (Charles R. Patton “Good Egg Award”) (cont’d)

The following individuals have received the “Good Egg Award:”

Alexander, Charles
Austin, Bill
Bales, Shirley
Boudras, Alex
Bromley, Edward
Creger, Lillian
Dickens, Charles H.
Fuller, Walter
Garrison, Catheryn
Ghent, Avery
Hambright, Fain
Harbuck, Henry
Hatcher, George R.
Hearren, Alvea

Hobgood, Thomas N.
Holden, Barbara
Hughes, Elaine
Kelly, Joseph
Kolbe, Melvin H
Lehning, Charles L.
Lehning, Percy
Lovvorn, Roy
McGraw, Aileen E
Olynick, Rose E.
Paramore, Lee
Parker, Elsie
Patton, Charles R.
Pifer, Jerry
Piper, Edward R.

Quinn, Milton
Sabo, George W.
Simpson, Mary
Smith, Delores
Smith, Milton
Stone, Milton
Storch, Lyle V.
Thatcher, Robert C.
Wallace, Helen
Warren, Louise
Whitten, Betty J.
Wright, Pearl

Honorary:
Mr. & Mrs. James B. Mong

**THE MISSION OF THE NATIONAL ACTIVE AND
RETIRED EMPLOYEES ASSOCIATION IS:**

- . To support legislation beneficial to current and potential Federal annuitants and to oppose legislation contrary to their interests.
- . To promote the general welfare of current and potential Federal annuitants by advising them with respect to their rights under retirement laws and regulations.
- . To cooperate with other organizations and associations in the furtherance of these general objectives.

**THE NORTH CAROLINA FEDERATION OF CHAPTERS IS
A STRONG SUPPORTER OF THESE GOALS AND
OBJECTIVES AND STRIVES TO BE THE BEST AT ALL
TIMES.**



**National Active and Retired
Federal Employees Association**