

NARFE
52nd Colorado State Convention
And
Region VII 13th Biennial Conference

Introduction

The Colorado Federation sponsored the 2017 Region VII Conference held on June 30 and July 1, 2017 in Aurora, Colorado. Attendees came from the five Federations in Region VII: Wyoming, Colorado, Utah, New Mexico, and Arizona. The largest delegation of several dozen folks was from Colorado, while New Mexico was represented by Sharon Reese, Marian Thornton, Billie Jean Zinter, Mark Mickelsen, Sharon Willoughby, Lee Tomlin, Roy Willoughby, Marcele Skelton, Irv Skelton, and John Reese from the following chapters: Albuquerque; Las Cruces; and Rio Rancho. Our Federation President Lorna Howerton was unfortunately unable to attend at the last minute, due to a sudden illness (she has since recovered); she was missed! The Utah Federation had only one representative attending: their Federation President.

Sharon Reese was invited by Ted VanHinton, Colorado Federation President, to attend their Executive Board Meeting the morning on the 29th. The Colorado Federation is the largest in the Region and work completely different than the New Mexico Federation. All Chapter Presidents are voting members of the Executive Board in addition to the President, Executive Vice President, Vice President, Secretary and Treasurer. District Vice Presidents are elected by Congressional District. They also give five \$100 gift cards to the top five new member recruiters. Short officer reports were given. They kept their meeting to only one hour!

The Colorado Federation Convention convened at noon on June 29th. In attendance were: Sharon Reese, Billie Jean Zinter, Sharon Willoughby, Roy Willoughby, Irv Skelton and Marcele Skelton. They had a very condensed Convention. Fifty-eight members were in attendance. The Credentials Committee gave their report. The Parliamentarian presented the Standing Rules and they were passed.

The Bylaws Committee Chair would NOT endorse the Bylaws that were presented in the booklet. The President presented the Bylaws that were published and had been given a cursory review/approval by Jon Dowie, National Secretary/Treasurer. After some discussion, the Bylaws passed as presented. They will be forwarded to National Headquarters for the final review/approval.

The Awards Ceremony was presented by the Awards Chair, Martha Leiker (also Past Region VII President).

Federation slate of officers was presented. As a result of the new Bylaws they no longer have District Vice Presidents. There was no candidate for Executive Vice President for Membership.

Approved by acclamation. Installation of newly elected officers was conducted by Jon Dowie, National Headquarters Secretary/Treasurer.

There was no Memorial Service. A pamphlet was provided for the Memorial.

The Convention adjourned at 4 pm. Only four hours long!

The festivities began with a Taco Bar reception on Thursday evening, June 29 in the hotel, sponsored by GEHA. All New Mexico attendees participated. I attended and enjoyed mingling. There I met our new NARFE National CEO Barbara Sido. She was friendly, approachable, and quite impressive. I also met John Dowie, our NARFE National Secretary/Treasurer, likewise impressive. Sharon also met with Barb for over half an hour discussing several issues. Our NARFE National President Richard Thissen was slated to attend, but could not, so Mr. Dowie came in his place. Both Ms. Sido and Mr. Dowie spoke to the conference during the regular sessions in the coming two days. Also in attendance was our Region VII President Rodney Adelman, who also took a prominent and much appreciated role in the conference.

On the actual conference days, there were representatives in the Conference Foyer from various FEHB Plans (Blue Cross, Presbyterian, GEHA, etc.), OPM, the Social Security Administration, and Firt Command Financial Services. Brochures of their services were available for the taking. There were also tables where we could purchase raffle tickets for door prizes, with the proceeds going to Alzheimer's research or FEEA.

Friday morning, June 30

Frank Impinna, Past President of the Colorado Federation, welcomed the participants. He was the Host Coordinator, so we owe him our thanks for him and his team putting the conference together. There followed the announcements; moment of silence; Pledge of Allegiance; and introduction of the honored guests, including Ms. Sido, Mr. Dowie, He then introduced and turned the Conference over to Mr. Adelman. There were 102 registered members in attendance. About a half of the attendees were first time Region Conference attendees. The speakers from the morning's session were as follows:

Philip Gardner, OPM Retirement Services

Mr. Gardner provided a brief overview of OPM's services. Statistics included: 2.7 million covered Federal employees, 2.6 million annuitant and survivors, 2.3 million inquiries (last year), 650 post retirement actions, 5.3 million have accounts on Services-in-Line, and have an 81-billion-dollar budget with 850 employees to assist everyone. He explained how we can access their "Services On-Line" option on the OPM Website to initiate desired benefits actions or to

have questions answered. There are two ways to reach OPM via the internet: “<https://www.opm.gov/retirement-services/my-annuity-and-benefits>” and “www.opm.gov/retirement-services/retirees-or-family-members: Or we can send an email to: retire@opm.gov. Using these electronic means can save a lot of time and anguish by not having to wait on hold on the phone to speak to an OPM representative. If we do need to call, use this number: 1-888-767-6738. OPM’s business hours are 5:40 am to 3:00 pm, Mountain Time. There are only 100 employees available to answer your calls. Calling during their first hour or two of business may provide quicker help. You may mail inquiries to P.O. Box 45, Boyers, PA 16017. He made himself available in the Foyer afterwards to answer questions and/or to provide individual help with retirement cases.

Jennifer Hilts, First Command Financial Services

Ms. Hilts spoke about the challenges of investing and getting a decent rate of return in the current low interest rate environment. She gave an overview of the recent announcement that the TSP will begin to offer more withdrawal options, which is excellent news for those with TSP accounts. She also discussed how to use an “Inherited IRA” as an investment vehicle to protect beneficiaries’ inherited TSP accounts from large tax penalties when accessed (for example, when children inherit a lump sum TSP account balance from a deceased Federal retiree or employee parent). Finally, she briefly outlined the services her company provides to Federal employees, retirees, and military families, and made herself available in the Foyer to answer individual questions. I have a handout from her with her contact information if anyone is interested in contacting her.

John Bryant, Social Security Administration

Mr. Bryant gave a thorough overview of the various benefit levels in Social Security. This included how the benefit is calculated, as well as the reductions in your benefit if you access it prior to your full retirement age or the increases if you access it after your full retirement age. He also encouraged everyone to establish a personal account on their website at www.ssa.gov. Doing so allows you to see your full earnings history, and you can contact them to correct any inaccurate information. It also allows you to see your projected or actual personal benefits, and to keep up to date on any policy changes.

Keynote Address by John Dowie, NARFE National Secretary/Treasurer

Mr. Dowie gave the annual “State of the Association” Address in place of the National President Richard Thissen. Mr. Dowie noted that the theme of the Conference, “Transforming NARFE Together” was fitting due to the tremendous changes taking place in the legislative threats we face to our benefits; ongoing challenges in membership recruitment and retention; and the evolving ways in which people in society relate to professional and service organizations. He assessed the challenges associated with the wide diversity of Federations in size, transportation challenges, etc. He noted that the loss in membership from year to year has been greatly reduced in the last few years, and we hope to see it stop altogether in the next few years and then either stabilize or perhaps even rise. His statistics included: In 2011 we had a decline of 6.02%, 2015 decline of 5.02%, 2016 decline of 4.54%. From January through May we have had a loss of 17345 members or 1.70%. Maybe, just maybe, we are leveling out. He discussed the importance of NARFE-PAC in NARFE’s lobbying efforts, and encouraged members to become Sustainers in NARFE-PAC. It can be done easily on-line for as little as \$10/month and provides planning stability for NARFE-PAC. He noted that non-dues revenues are increasing, which is helping to stabilize NARFE’s finances. He stated that the Webinars, NARFE Magazine, and the Help Line are the most used benefits. Finally, he stated that the Conference will be a valuable tool in helping us transform NARFE into a more effective organization for the future.

Jessica Klement, Legislative Advocacy and NARFE-PAC

Ms. Klement provided a great overview of the current status of the Administration’s proposed benefit cuts and the congressional budgeting process. Our Accomplishments last year included:

- * No deficit reduction
- * Prevented 52% increase in Medicare Part B
- * Flawed Postal Bill did not pass
- * Chained CPI no longer a threat
- * Extended identity theft from OPM database to 10 years
- * Maintaining our current benefits is considered a victory!

She stated that it’s important to understand that the Budget Resolution sets fiscal targets that guide the appropriations, while the Budget Reconciliation actually enacts the instructions from the appropriators into law. So NARFE closely monitors the Budget Reconciliation instructions to the various committees because that is what will be enacted. Reconciliation only requires 50 votes in the Senate, instead of the usual 60. She then went over the various proposed benefit reductions. NARFE’s top priorities are, in order of importance:

- Opposing cuts in earned benefits for current retirees: such as COLAs and FEHB;
- Postal Reform (requirement for postal retirees to elect Medicare);

- Earned benefits for current employees (High-3, FERS Annuity Supplement, etc.).

Other concerns are the WEP; Medicare Part B; Long Term Care premium stability; and TSP withdrawal and investment options.

She then emphasized using the NARFE Legislative Action Center to make our views known to our elected officials. You can use the form letters on the Center's web page, but it's best to customize your email or letter with your personal situation, to increase the likelihood that it will be read and have an impact. Or you can call Congress at 1-866-220-0044. She said repeatedly, "Silence = Acceptance of what is being proposed." Don't be silent!

NARFE-PAC is also essential. The funds are completely separate from NARFE operating funds, and NARFE-PAC funds go only to congressional candidates supportive of NARFE's positions. The funds are not doled out on a partisan basis; they go to any supportive candidates. The 2016 fundraising goals were exceeded: we raised \$1.45 million! So the 2017-2018 goal is raise at least \$1.5 million, with a stretch goal of \$1.65 million. The goal is to also increase the number of Sustaining Contributors by 50%.

Bridget Boel, Marketing

Ms. Boel gave an overview of membership. The membership loss has been slowing, which is good news. Members should use the Federal Benefits Institute, which provides information that OPM and Federal agencies sometimes don't provide. There will be two useful upcoming Webinars: Survivor Benefits—Key Decisions, on July 27; and From Federal Employee to Annuitant, on August 24. NARFE members get discounts from NARFE's Affinity Partners (listed in the NARFE Magazine), and NARFE gets royalties from those purchases. She then took questions from the audience.

Friday afternoon, June 30

Barbara Sido, National Chief Executive Officer

Ms. Sido introduced herself and her background (her bio is on the National Website). She expressed gratitude for the opportunity to serve in NARFE, and support for NARFE's mission. She cited NARFE's great strengths as committed members; a great retention rate; and lots of expertise in preserving and enhancing Federal employee/retiree benefits.

However, NARFE faces some significant challenges: a complex business model and bureaucracy; the need for a clear, consistent focus on our overall mission; and the need to focus on the needs of the members, not just those of Federations or Chapters.

NARFE does have an initiative to better develop leadership skills at the Federation and Chapter level. Her desire is to also have NARFE better market our expertise in Federal benefits information so that we become THE credible source that everyone would want to turn to for that information.

According to Ms. Sido, NARFE's Strategic Plan has 3 pillars:

- Advocacy
- Knowledge resources
- Marketing

Please feel free to contact Ms. Sido by email with any questions, ideas, concerns, etc., at: execdir@narfe.org.

After her presentation, she asked for an open discussion with the audience about what NARFE does well and does not do well. There were a lot of responses, which I did not take notes on. However, in the follow-up discussion there was a lot of emphasis on the issues of how we can use technology better, and how to improve the image of Federal workers.

Note: Friday night was the Banquet, which was well attended. Awards and presentations were made. One of the presentations was certificates for Chapter Founding Anniversaries. Region VII VP Rodney Adelman noted that the Albuquerque, Las Cruces, and Santa Fe Chapters all received Certificates and Congratulatory Letters for their 65th Anniversaries.

Saturday morning, July 1

The first item of business was photos taken of Federations and/or Chapters. The New Mexico participants gathered for a New Mexico group photo, followed by a separate photo for the Las Cruces Chapter participants.



Region VII Report by Rodney Adelman, Region VII VP

Rodney shared his Region Report with us. The Arizona, Colorado and Utah Federations have already had their new By-Laws pre-approved by Headquarters prior to voting on them. The New Mexico and Wyoming Federations are still working on theirs, and they should be ready soon. He appreciates that the Chapter Bank/Credit Union Account verifications have been completed. The SL/CDL system has been implemented in New Mexico, Colorado, and Arizona, and seems to be working quite well.

Our Region VII has led the nation in participation in Region VII Webinars. The webinars have been revamped to be more policy-oriented instead of process-oriented. He reiterated his view that chapters need to have a NARFE-PAC Chair, a Federal Legislative Chair, and a State Legislative Chair. In terms of recruiting, the Las Cruces Chapter won the Region Grand Prize for recruiting, while a Colorado member was the single biggest recruiter.

Region VII has lost fewer members proportionately than NARFE as a whole. We also have the lowest number of member deaths of any region. We have the highest percentage of National-only members at 32.3%.

The individual Region VII Federation Presidents followed with their individual reports. Because Lorna was unable to attend, Legislative VP Sharon Reese presented Lorna's President's Report.

Highlights of the New Mexico Federation President's Report

In 2017 there were 2,110 NARFE members in New Mexico. We are divided into four districts: NE, NW, SE, and SW. 207 of our members are Federal employees. We have lost 6 members this year to date. We now have the SL/CDL system in place. 2 Workshops were held in April: the North Workshop in Espanola and the South Workshop at Elephant Butte. Excellent presentations were made and the results were impressive. Our 2018 Convention will be held in Tucumcari. We continue to strive to improve and serve all our members, whether in Chapters or as National-Only members. Note: For the full report, please contact either Lorna Howerton or Sharon Reese.

Debra Cruner, Alzheimer's Chair's Report

In terms of Alzheimer's fundraising, we raised \$25,000 in 2016 and have already raised \$21,000 thus far in 2017! Members can participate in local "Walks for Alzheimer's" to raise funds. Sharon Reese of Las Cruces noted that the Las Cruces Chapter has drawings/fundraisers for Alzheimer's at its chapter meetings.

Debra Cruner, Configuration Advisory Board Report

To improve our computer and data processes, we have four working groups with 10 members answering questions from the field and striving to improve the computer workings, etc. She is available for presenting a training workshop.

FEEA Report by Sharon Reese, Region FEEA Chair

FEEA serves the Federal community through emergency loans; disaster relief; scholarships; and childcare subsidies. FEEA Headquarters is moving from Lakewood, Colorado to Alexandria, Virginia. Contributions can be made either on-line or by check. If you contribute, be sure to annotate your Chapter Number in order to get credit for your Chapter.

As of June 2017, total Region VII contributions thus far in 2017 are \$1488.00. Of that amount, New Mexico has contributed \$490.00: \$280.00 for Relief efforts, and \$210.00 for Scholarships. Donations made at the Convention totaled \$638.00.

FEEA contributions can be sent either directly to Sharon Reese or to FEEA HQ, 1641 Prince Street, Alexandria, VA 22314, or online at "www.feea.org/give. please annotate your Chapter number.

Ted VanHinton, Strategic Planning Committee Report

This committee is exploring how to better support Federations and Chapters. The committee has held one meeting and sponsored four Webinars. Results are on the NARFE Website. The committee has concluded that at a minimum, a Federation must be able to effectively do the following:

- Advocacy on behalf of NARFE's mission
- Membership services
- Support its Chapters.

Also, it must be able to administer Federation finances and allocate resources to NARFE's core missions. The committee believes that the organizational structure of Federations should be updated to reflect our core missions. The committee had looked at combining Regions to reduce the number from 10 to 5; however, that proposal was dropped after it was defeated by 80% of votes at the last National Convention.

NARFE-PAC Report by Region VII VP Rodney Adelman

The purpose of NARFE-PAC is to support and elect congressional candidates supportive of NARFE's mission and positions. Here's how we stand so far:

Region VII had 332 contributors, which ranks us in the middle of the Regions. We collected \$17,256.90, which is unfortunately last in dollar amounts by Region, probably because we are the second smallest Region in membership. The average contribution was \$52.50, which was above average for Regions. We were also unfortunately last in number of Sustainers: 48.

Within Region VII, New Mexico contributed \$2,870, with the average contribution being \$40. New Mexico had 17 Sustainers.

New Mexico Senator Martin Heinrich received a NARFE-PAC contribution of \$1,500.

Debate between John Dowie and Joe Beaudoin

The final item of Conference business was the debate held between National Secretary/Treasurer John Dowie and Immediate Past President Joe Beaudoin regarding the proposal to amend the National By-Laws to permit the current National President Richard Thissen to run for a third term (he's currently limited to two terms). John Dowie was at the Conference but Joe Beaudoin was not, so the debate was held via Video Link with Mr. Boadwin visible on a giant screen at the front of the room. After the Region VII Conference I sent our NE Chapter Presidents the one-

page handouts from Mr. Dowie (who took the pro position) and Mr. Beaudoin (who took the con position), so that they could distribute the information to their Chapters, and therefore they and/or their Chapter members could contact Lorna with their opinion on this matter prior to Lorna attending the July Federation Presidents Meeting in Jacksonville, Florida where this would be voted on. I must say here that the Video Link debate was polite, informative, and the two men conducted themselves honorably, much better than many candidates in the 2016 presidential primaries did!

After the Region VII Conference, Lorna emailed the Federation Executive Board the results of the vote on this matter at the Jacksonville meeting. Here is what Lorna said in her email:

“I wanted to let you all know that the referendum on the issue of a possible 3rd term for NARFE Presidents was not approved by the National Executive Board. Therefore, there will not be a special ballot in the NARFE Magazine [for NARFE members to vote on]. The Strategic Planning Committee can choose to withdraw the proposed amendment altogether or can re-submit the by-law amendment during the normal cycle for member voting next year. There was no other business conducted by the National Executive Board during the Federation Presidents Meeting.”

Conclusion of the Conference

Conference Chair Frank Impinna and Region VII VP Rodney Adelman made brief concluding remarks. They thanked the organizers and participants, and encouraged all the attendees to share what we learned at the Conference in our Federations and to reach out to our members to energize them during the challenging times to come. They also asked us to thank our members and officers for all they do to advance NARFE’s work. The conference concluded at about 12 noon on Saturday, July 1.

This report was written by Mark Mickekson with contributions, coordination, review, and approved by all New Mexico attendees. (Sharon Reese, Marian Thornton, Billie Jean Zinter, Mark Mickelsen, Sharon Willoughby, Lee Tomlin, Roy Willoughby, Marcele Skelton, Irv Skelton, and John Reese)

