

DECREASED MEMBERSHIP WITHIN THE NARFE ORGANIZATION:
A QUALITATIVE NEEDS ASSESSMENT STUDY

by

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A Dissertation Presented in Partial Fulfillment
of the Requirements for the Degree
Doctor of Business Administration

University of Phoenix

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DECREASED MEMBERSHIP WITHIN THE NARFE ORGANIZATION:

A QUALITATIVE NEEDS ASSESSMENT STUDY

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ABSTRACT

The problem is that the National Active and Retired Federal Employees Association (NARFE) has declining membership. This decline reduces NARFE's effectiveness in lobbying for federal employees and retirees, resulting in lost revenue and decreased efficacy. The purpose of this qualitative needs assessment study was to explore why the National Active and Retired Federal Employees Association (NARFE) has declined in membership. It is significant that if the issue of declining membership is not resolved, the organization might be on the verge of dissolving its business and mission of protecting the welfare and benefits of the federal community through the efforts it provides in lobbying Congress. The four guiding research questions were addressed in the research problem. The research method is qualitative, with a needs assessment design. It entails a membership population of 130,000 employed federal workers, retirees, and approximately 30,000 former members. The sample consisted of 100 participants, comprising 50 retirees and 50 employed federal workers, and a data analysis procedure was performed using software. The results showed how it may help marketing teams within member-driven organizations develop new marketing techniques based on understanding the different needs of new, current, and former members. The results of this study created themes that produced recommendations for each theme to reverse the trend and ways to correct the problem. The implications for practitioners and leaders could be construed by using data analysis to identify and explain a phenomenon, and the outcome of any research could disclose influence and potentially affect a study's transferability or outcome.

DEDICATION

To my wife, Dolores Impinna, who has loved, motivated, encouraged, and supported me through this academic journey and throughout our entire marriage.

ACKNOWLEDGMENTS

I extend my deepest gratitude to all the individuals who contributed to the successful completion of the study. First, I would like to thank my dissertation chair, Dr. Alfreda Goods, whose expertise, understanding, and patience significantly improved my graduate experience. Your guidance helped me at all stages of research and writing this dissertation. I thank Dr. Janet Harrison, University Research Methodologist, whose patience, direction, and insights influenced this dissertation. I thank Dr. Zalika H. Etienne, the panel validator, for their insightful comments and encouragement. I also thank the University of Phoenix for providing the necessary research resources. I am thankful to all the study participants whose insights and feedback were invaluable in shaping the final recommendations. I am also grateful to my peers and colleagues, who reviewed my work and offered essential feedback that improved the presentation and structure of this dissertation.

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Chapter 1

Introduction

Associations and unions have, through individuals, independently come together in a formal organization to negotiate and advocate for members' interests. Much emphasis is placed on recruitment efforts to increase the organization's advocacy power and strengthen its respective coalitions (NARFE, 2024). One such organization, the National Active and Retired Federal Employees Association, also referred to as NARFE or the association was incorporated under the laws of the District of Columbia on February 27, 1947, to protect the interests and welfare of federal employees stipulated in the NARFE Bylaws (NARFE, 2024). Additionally, the NARFE organization collaborates with numerous associations through a coalition seeking similar legislative goals as stipulated in the NARFE advocacy department (NARFE, 2024). As individuals retire, NARFE and similar associations strive to protect and sustain retirement benefits, including ensuring retirees continue receiving Cost-of-Living Adjustment (COLA) benefits. Meanwhile, active federal employees seek to prevent Congress from increasing their annuity contributions through legislative measures. A rapid decline in NARFE membership and attendance jeopardizes the survival and vitality of the association. If the association continues to decline and finally has no membership, NARFE will no longer have a purpose in providing advocacy, which is central to its mission (Fowler et al., 2020). Within the context of this research study, this issue frames the background of the problem, introducing the research topic of declining attendance and membership in NARFE. The problem statement defined attendance and membership decline and its impact on the federal community, whereas the purpose of the study discussed the study's primary objective. The research proposal presented a qualitative analysis supporting documentation of the problem and methodology that helped the organization avoid declining membership and revenue reduction problems to continue NARFE's mission. This

research will allow new insights to support what needs to be undertaken to comprehend and counteract declining membership in the NARFE organization. Chapter 1 provided information related to the background of the problem, the problem statement, revealing the issue of concern, and the purpose of the study focusing on the problem, the population and sample used, and the significance of the study that explained why the study was being investigated. In addition, the nature of the study (research methodology with proposed method and design) described the means of achieving the study, research , focusing on the problem, the population and sample used, and the significance of the study, which, conceptual framework, definitions of terms, assumptions, limitations, delimitations, and the chapter summary.

Background of the Problem

The size and composition of the federal workforce provide an important context for understanding current employment trends and workforce planning challenges. According to the Federal Employees Retirement System (2022), there are over 2,832,000 federal retirees in the United States, while the Federal Workforce Statistics Sources (2024) report that the federal workforce includes approximately 4,374,878 active employees. Founded by 14 federal workers in 1921, NARFE has grown into an influential and highly respected legislative voice for both federal employees and retirees. Through its legislative efforts, NARFE was established to protect the welfare and benefits of all federal workers, ensuring their financial security both during and after their careers in public service.

The Mission of the National Active and Retired Federal Employees Association (NARFE, 2024) 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 to further these objectives.

The National Active and Retired Federal Employees Association (NARFE) is the only association dedicated to safeguarding and enhancing the earned pay and benefits of active and retired American federal employees and their survivors (NARFE, 2024). All active federal employees are potential NARFE members, but accessing these prospective members presented a challenge. However, there has been a far greater interest in information and guidance, with a higher propensity to engage online. In this case, NARFE has responded using a digital approach.

NARFE field recruiters once had access to local agency buildings and the opportunity to engage with active federal employees within agency buildings. For security reasons, agencies no longer allow NARFE members to enter many federal work locations. NARFE now has entered virtually with online marketing targeted directly to the active federal employee, offering products specific to the member's federal benefit needs via the NARFE Federal Benefits Institute (NARFE, 2024). This is a new and fertile gateway for gaining and retaining members. NARFE has recruited by soliciting potential or prospective members at yearly Health Fair events scheduled and set up in federal agencies and provided by Health Insurance Premium Companies (J. Fluekiger, personal communication, February 15, 2024). NARFE promotes a yearly recruiting incentive for members from September 1st until December 31st with compensation and drawings (NARFE, 2024).

NARFE is not a union. A union is an organization established to protect and improve the interests of its members directly in the work environment, and representatives negotiate by improving pay, pension, working conditions, and other workplace benefits (Morris, 2021). Unions induce individuals into a collective organization and provide the training and resources

necessary to pursue collective goals (Rosenfeld, 2007). The NARFE Association is a non-profit organization identified in 26 U.S.C. 501(c)(5) and should not be considered a union. As a member-benefit nonprofit organization, NARFE does not directly serve the public, but it directly serves its members of the federal community (Smith, 1993). NARFE also worked in partnership with other organizations seeking to accomplish similar legislative goals and founded the Federal-Postal Coalition in the 1970s by having NARFE and federal and postal employee organizations like the Fund for Assuring an Independent Retirement, or FAIR; the coalition fought initially against Social Security coverage for federal employees (NARFE, 2024). Over the years, FAIR changed its name to the Federal-Postal Coalition and now includes over 30 national organizations.

Problem Statement

The problem was a declining membership in the National Active and Retired Federal Employees Association (NARFE), resulting in a decline in NARFE's effectiveness in lobbying for federal employees and retirees, resulting in lost revenue and decreased efficacy (W. Shackelford, personal communication, March 13, 2025). The reduction in revenue and diminished effectiveness as a lobbying organization has constrained its capacity to support federal employees and retirees in advocating for policies that facilitate economic distribution to advance public interests (Fowler et al., 2020; Hanegraaff & Poletti, 2021; Harris, 2021). If lobbying efforts are diminished, NARFE could lose many members yearly. A decline in lobbying efforts could result in a significant annual loss of NARFE members. Enhancing member retention would strengthen the organization's influence and expand the benefits of its services, mainly through the Federal Benefits Institute, advocacy initiatives, and legislative efforts. These improvements would bolster NARFE's impact when its president testifies before

Congress in Washington, D.C., alongside lobbying staff engaging with congressional representatives in the House and Senate.

Purpose of the Study

The purpose of this qualitative needs assessment study was to explore why the National Active and Retired Federal Employees Association (NARFE) has a declining membership, which resulted in NARFE's less effective lobbying efforts on behalf of federal employees and retirees. This study aimed to better understand why many previous members had declined NARFE memberships, since a significant drop in enrollment could significantly affect the organization's ability to influence lobbying efforts (Gover, 2022). A letter was sent to recipients with a written request for their approved participation in a survey. The selection of former and active members was derived from the membership engagement department from those residing in the United States.

In this section, the premise was to stress the need for a survey to determine the membership decline and further root causes. This proposed qualitative needs assessment study focused on an opportunity to explore membership decline from the perspective of leaders, new members, current members, and former members (Harris, 2021). A qualitative survey was conducted using open-ended questions to gather in-depth insights. Further exploration into why membership non-renewal was necessary, as various internal and external factors may have influenced these decisions. A qualitative needs assessment approach was employed to examine the underlying causes of membership non-renewal, providing a comprehensive understanding of the contributing factors and organizational implications. Therefore, understanding internal factors like renewal statements, fellowship underlying forces, culture, or leadership or external factors like personal reasons directly impacted organization retention efforts (Elkins, 2019). This research proposal presented a qualitative analysis supporting documentation of the purpose,

problem, and methodology that helped the organization avoid declining membership and revenue reduction problems for continuing NARFE's mission.

Population and Sample

The population for this qualitative study comprised participants selected from the rolls of the former membership lists and the renewed list from the NARFE membership department population of 130,000 members residing throughout the United States. Fifty participants were selected randomly from the rolls of the former membership lists and the renewed list from the NARFE membership department population of members to have reliable response data. A letter was sent to the 50 recipients of each group with a written request for their approved participation in a survey. Since human subjects are involved in obtaining data from the researcher, the researcher required approval from the Institutional Review Board (IRB) (see Appendix G). "The paramount purpose of the IRB is to protect the rights and welfare of human subjects" (Herr & Anderson, 2014, p. 13). Ethics also binds researchers to protect human subjects from harm (Burr & Gibson, 2018). The consent forms were completed by participants who agreed to participate. Collaboration and approval were obtained from the organization to determine the necessary data for the research study. Participants who wanted to withdraw from participating in the research were entitled to do so. There could be dilemmas in designing a research project due to what represents the best democratic approach, with participants being what Herr (2014) presented as insiders or outsiders. A democratic approach refers to a method or process that emphasizes participation, inclusivity, and shared decision-making among all parties involved. It is based on the principles of democracy, such as fairness, equality, and collective input. The insiders are those continuing to be loyal members, and the outsiders are the dropped members who have discontinued their membership.

Significance of the Study

The following sentence focused on the significance of this study and what it entailed: the issue of declining membership in NARFE and its consequences. This qualitative needs assessment study explored the problem of the declining membership within the National Active and Retired Federal Employees Association (NARFE), and its subsequent impact on revenue loss and the organization's diminished effectiveness as a lobbyist organization advocacy for federal employees and retirees (Fowler et al., 2020; Harris, 2021). This decline would have influenced the organization's demise due to insufficient membership fees to provide financial support if the issue of declining membership was not resolved. In that case, the organization would be on the verge of dissolving its business and mission of protecting the welfare and benefits of the federal community through the efforts it provided in lobbying Congress.

The decline in membership cannot be ignored. This decline suggested the need to reevaluate its technique for attracting prospective members while retaining current members by closely examining the value of NARFE's services. NARFE would have needed to improve internal operations to process members' renewals more efficiently and enhance programs to increase membership through media, emails, or face-to-face interactions. NARFE's assessment of members' services and needs is essential for sustaining lobbying efforts for federal employees and retirees, allowing for a more effective and significant influence in lobbying efforts (Gover, 2022; Wilson, 2022). NARFE lobbies for the interests of its members with their congressional representatives in Washington, DC, to protect members' benefits and welfare.

Other nonprofit and for-profit organizations have faced a similar problem of declining membership and have conducted studies to investigate and resolve their dilemma. This study could benefit scholars and practitioners as it provided a foundation for future studies that could extend and apply the results to other organizations suffering from a similar membership that is

stagnant and declining. The findings from this research study can help marketing teams within member driver organizations develop new marketing techniques based on a deeper understanding of the different needs of its new members, current members, and former members. The overall significance of this study was to help the organization recognize that prospective and existing members have distinct needs that must be addressed in the scope of what an organization could offer. Additionally, this research's potential benefits can increasingly significantly influence NARFE's advocacy efforts. By applying the study's insights, NARFE could have been better positioned to fulfill its mission of protecting the welfare and benefits of its members, supporting legislation beneficial to current and potential federal annuitants, and opposing legislation contrary to their interests.

Nature of the Study

To understand the nature of this study, reasons were given for why qualitative research was best suited for this study and why other research methods were not suitable. A quantitative research method was not appropriate for this study because quantitative research involves numerical data, testing hypotheses and theories, using large samples, collecting data, and then conducting statistical analysis (Chalmers & Cowdell, 2021). Since exploring the decline in NARFE's membership required responses from participants through open-ended questions, a qualitative approach was necessary, as numerical data alone could not provide the depth of understanding needed for this inquiry. Creswell and Creswell (2018) described quantitative research questions as tools to investigate the affiliations among variables the researchers seek to understand. Quantitative hypotheses involve numeric estimates of population values and rely on statistical procedures. Numerical data generated from quantitative methods alone cannot explain the extent of the reasons behind individuals' decline in membership, as each individual can have different outcomes and perspectives. A mixed methods research design that combines qualitative

and quantitative research could have helped. Data from any of these methods contributes to research results aimed at explaining, understanding, and discovering the problems of who, what, how, and why. Besides quantitative research, other designs were considered inadequate for this study. For example, ethnography design involves systematically studying a culture that requires permission to study sites (Wilcox, 2008). This approach is conducted through “participant observations, interviews, artifacts, and documents of a culture-sharing group” to analyze its values, beliefs, and assumptions, ultimately producing a narrative account of that culture (Hesse-Biber et al., 2019, p. 239). However, the ethnographic design was unsuitable for this study, as it did not align to derive valuable open-ended responses from a survey to understand why NARFE’s membership declined. Therefore, this researcher pursued a qualitative needs assessment design to facilitate open-ended research questions, allowing for a deeper exploration of the factors influencing NARFE’s membership decline through data collection and analysis. Qualitative research was suitable for a reflective understanding of a social situation or encounter as perceived from the perspective of the research participants (Bloomberg & Volpe, 2019). A qualitative method was more appropriate to this research study's problem and purpose, as it aimed to determine the reasoning behind the decline in NARFE’s membership and explored attendance and membership decline from the perspective of new, current, and former members (Harris, 2021). Although there are multiple qualitative research designs, the needs assessment design was most appropriate for this study because this research study aimed to fulfill unsatisfied needs, such as increasing membership and improving declining membership in NARFE, to prevent revenue loss (Chen, 2005). A qualitative needs assessment study research design differs from other studies in obtaining participants' responses and involvement, particularly concerning retention (Yin, 2017). The needs assessment design was used to identify deficits between the current organizational state and the desired state, offering recommendations on how to address

the disparity between the current and desired states (Wuttikamonchai et al., 2024). The qualitative needs assessment method was suitable for addressing the social problem of declining membership in NARFE by understanding participants' opinions, perceptions, and feelings or reviewing documents related to the membership decline. An aspect of the design includes what Thomas (2023) spoke of as the emergent design, where one lets the design happen as the situation develops in the interest of the research.

This research method aimed to determine the factors associated with NARFE's declining membership by analyzing survey results from two participant groups. The researcher sought to accomplish the objectives by analyzing the collected data to identify patterns that could help explain the phenomenon. The findings helped develop recommendations for essential process changes (Grossman et al., 2022).

As related to the purpose of this research, the intention was to use applied research designed to identify solutions to specific issues or find answers to particular questions, in this case, to explore why the National Active and Retired Federal Employees Association (NARFE) has experienced a declining membership. Applied research offers knowledge that is applicable and implementable. According to James and Slater (2014), applied research is when a "solution leads to improvement of a life situation and must be described (as a potential) in the problem statement" (p. 5). A qualitative method was chosen as an approach to inquiry, focused on collecting data in a natural setting while being considerate of the participants and places under study (Hesse-Biber et al., 2019). A mixed method combines a quantitative component and a qualitative database method, but this study focused on the qualitative method. While a grounded theory design could be sought to develop a theory of declining members' behavioral process and explain their lifestyles' pathways, grounded theory research is typically associated with

qualitative methods rather than quantitative (Hesse-Biber et al., 2019). Therefore, the researcher opted for a qualitative approach to best address the issue of NARFE's membership decline.

The topic of this passage is the use of a needs assessment research design to explore why members choose not to renew their memberships in an organization. The study aimed to identify deficiencies contributing to declining membership and assess how improving membership retention could enhance the organization's financial status. It also suggests that the findings might reveal NARFE's lobbying effectiveness issues. The specific research design, a needs assessment research design, was more appropriate for the approach. A needs assessment is a method that endeavors to estimate deficiencies (Balci, 2022). This design focuses on determining the primary concerns by focusing on the problem and the need to identify deficits. The research design aligned with the problem by using a needs assessment research design that addressed the challenging problem of declining membership within the organization, aimed to improve and increase membership to enhance the organization's financial status. The outcome would reveal that NARFE's lobbying efforts on behalf of federal employees and retirees are less effective.

A qualitative questionnaire with open-ended questions aligned with the research design. Research questions were addressed by exploring participants' beliefs, preferences, and experiences based on responses to two open-ended surveys. The survey was instrumental in gaining responses to four research questions. These four research questions were developed to address the issue of declining membership in NARFE. The research questions for this study are the following:

Research Questions

R1. How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?

R2. What can NARFE do to influence members to renew their membership?

R3. How can NARFE attract new members?

R4. How can NARFE encourage members to remain in the organization?

Conceptual Framework

A conceptual framework creates a lens through which a study is conducted by defining the main ideas and mapping their relationships. It grounds the study in relevant knowledge bases, laying the foundation for the importance of the problem statement and research questions. This framework helped organize and systematize the research, ensuring the study was within the existing body of knowledge (Rocco & Plakhotnik, 2009). This research was guided by a qualitative needs assessment approach, which, as outlined by Herr and Anderson (2014), effectively served as the conceptual framework, enabling the structured presentation of qualitative data in alignment with the study's purpose. It was claimed that qualitative methods involve working with people to gather data regularly in an arrangement of words and were useful when exploring human experience (James & Slater, 2014). Figure 1 illustrates the following stages: analyzing the data, interpreting the findings, and making recommendations.

Figure 1

Needs Assessment Framework



A needs assessment is a systematic process used to identify and evaluate gaps between the current conditions and the desired or required conditions within a community, organization,

or group. It helped determine the specific needs, priorities, or challenges that should be addressed to improve performance, efficiency, or well-being. In various fields, such as education, healthcare, and business, needs assessments are often conducted to guide decision-making, allocate resources, and develop strategies to meet identified needs (Balci, 2022). The needs assessment began by gathering evidence through a survey, such as responses to why NARFE has a declining membership. A survey is a process that involves designing, distributing, collecting, and analyzing data from respondents. A questionnaire is a set of written or digital questions designed to collect information from respondents.

Other theories underpinning this research are social identity theory, reference group theory, and the theory of cognitive dissonance. A qualitative needs assessment addresses a social problem by understanding participants' opinions, perceptions, and feelings or reviewing documents. It was found that theories and concepts investigated and applied to this research, and would frame the research, were organizational systems theory from studies of how things go wrong in organizations (Ramsey, 2022). There is organizational learning theory, which inspects the role of job struggle in collaborative innovation projects (Mu et al., 2021). Another is retention theory for strategies aimed at retaining customers (Capponi et al., 2021). Lastly, Maslow's Hierarchy of Needs, can be valuable as it is a motivational theory comprising five levels of human needs, the third level points out love and belongingness needs, which refer to a human emotional need for interpersonal relationships, affiliating, connectedness, and being part of a group (Sirgy, 1986; Tudor & Petre, 2021).

Further investigation into the examination of recruitment strategies could help improve membership growth or underpin the research study. Using quantitative research on NARFE's improvement of its internal operations to process members' renewals and programs to increase membership through media, emails, or face-to-face interactions could sway the difference in how

participants felt about the benefits they received from the organization. Social identity theory could underpin its assessment of its services, where individuals viewed themselves as members of NARFE, not realizing that their needs were necessary to carry on the business, and where NARFE does not uphold its values and beliefs.

Definitions of Terms

The following terms may be unique to and frequently used in this study; therefore, they have been listed and defined in this section to clarify and avoid ambiguity.

Cognitive Dissonance: Implies that people find their feelings are different from their reality as they reflect on their behavior (Festinger, 1957).

Current Member: Refers to individuals with a 1-year to 3-year membership in the NARFE organization (NARFE, 2024).

Needs Assessment: This method endeavors to estimate deficiencies. It determines the primary concerns by focusing on the problem and the need to identify deficits between the current organizational state and the desired state, and provide recommendations regarding how to address the gap between the present and desired conditions (Balci, 2022).

New Member: This refers to individuals with an initiated 12-month membership or more who are recruited only from the federal community (NARFE, 2024).

Non-profit organization: is identified as an association eligible for the 501(c)(5), 501(c)(3), or 501(c)(7) (IRS, 2023).

Assumptions, Limitations, and Delimitations

Assumptions

An assumption is an inference that occurs when judgments are made based on some evidence or are assumed to be true (Kyburg & Teng, 2001). Assumptions considered for this study focused on the research methodology and participants. The researcher assumed participants

answered the survey truthfully and cooperatively without the intention of falsely endangering the study or the NARFE Organization. The population for this qualitative study was comprised only of participants selected from the rolls of the former membership lists and the renewed list from the NARFE membership department population of those members residing throughout the United States. Sufficient members were assumed to have been recruited from the membership lists to have reliable response data. The researcher assumed that more than an adequate number of participants would be available if a participant withdrew from the study.

There was a concerning assumption that the target population responded honestly to the survey. If the knowledge from all participants was honest and reflected one's personal view, a research study would become valid (Oplatka, 2021). The assumption that the organization's values possibly influenced the organization's membership soon ceased to exist for the members when a misalignment of values occurred (Harkins, 2021). It was assumed that this study might have further uncovered proposals for solutions and alleviation of the problem (Creswell & Creswell, 2018).

Limitations

Limitations to this study pertained to the researcher, applied survey techniques, participants, and research approach, which could have impacted or influenced the interpretation of the findings from the research (Bloomberg & Volpe, 2019). The participants' information limitations revolved around the responses to the questionnaire and not on age, gender, or ethnicity. The researcher's approach was to carefully interview the participants for truthful and cooperative answers to the questionnaire, remain aware of all potential causes of bias, and take all possible actions to reduce or minimize departure from the truth. Answers were ascertained through appropriate open-ended questions from the questionnaire to address this limitation. This qualitative study was limited to the federal community, specifically NARFE active members

who had declined further membership. Access to a new generation of prospective members with little interest in advocacy was also limited. A far greater interest was in information and guidance, with a far higher propensity to engage online, which was how NARFE addressed this issue. Determining what delimitations could have yielded further insight into reversing limitations was appropriate.

Delimitations

The delimitation for this research study included selecting participants from the rolls of the former membership lists and the renewed list from the NARFE membership department population of those members residing throughout the United States. The delimitations process was a standard for efficiently constructing the research process, data collection, and analysis (Coker, 2022). One delimitation was that modifying and developing new programs and materials to counteract limitations could have improved the ability to overcome the limitations of established retention and recruiting methods (Tao et al., 2023). Because NARFE's membership had been declining, it experienced challenges in its efforts to lobby, and any improvement to increase membership and the number of members that the lobbyist could represent may have enhanced these efforts. The researcher included and excluded delimitations to make a dissertation controllable and fixated on the research question (Coker, 2022). According to Coker (2022), the delimitations of a study are generally those descriptions that result from the limitations in the extent of the study. The delimitation for this research study included selecting participants from the rolls of the former membership lists and the renewed list from the NARFE membership department population of those members residing throughout the United States. Overcoming the limitations of established retention and recruiting methods could be improved by modifying and developing new programs and materials (Tao et al., 2023).

Chapter Summary

Declining membership is a problem many organizations, including NARFE, encounter. Chapter 1 began with an introduction and background of the NARFE organization, created in 1921 to protect the welfare and benefits of all federal employees and retirees through legislative efforts (NARFE, 2024). Chapter 1 identified the research problem, provided a conceptual framework, and identified the appropriate research methodology for conducting the study.

Generally, a survey or questionnaire was appropriate for collecting data for research questions. Here, an open-ended survey was used to collect data for this study, identify and analyze patterns in the data, explain a phenomenon, and develop essential changes to the current processes (Grossman et al., 2022). The data were derived from responses from prior members who had ceased their membership and those who remained loyal, with participant comments from both dropped and renewed members (see Appendix C and D). The research questions were intended to provide insight into the behavior and the attitudes that could have influenced NARFE's changes and improvements to programs that fulfilled the members' needs. NARFE sought greater insight into understanding internal operations regarding processing members' renewals and implementing programs to increase membership through media, emails, or face-to-face interactions. There was a discussion to understand the internal programs that produced incentives to increase membership and revenue (such as offering informative webinars at the application fee amount), and an external investigation into how to maintain membership. This chapter provided supporting documentation on the Nature of the Study, including the appropriate needs assessment study to explore attendance, membership decline, and other designs considered (Harris, 2021; Wilcox, 2008). It also discussed the proposed research design and its importance over other possible research designs in more detail. Chapter 1 explicitly addressed that all active

federal employees were potential NARFE members, but limitations on accessing these prospective members presented a challenge.

Chapter 2 presents a review of the academic and professional literature encompassing current and historical studies. The literature review examines these areas independently to understand the stated phenomenon comprehensively. Furthermore, the literature review offers a foundational comprehension of the various concepts included in this research study.

Chapter 2

Literature Review

This qualitative needs assessment study explored why the National Active and Retired Federal Employees Association (NARFE) has a declining membership, which has resulted in lost revenue and less effectiveness in NARFE's lobbying efforts for federal employees and retirees. Furthermore, this study could have improved management's knowledge about programs that could have affected the organization's decision-making on members' services (Zeimetz, 2019). A program is usually regarded as ineffective if it fails to reach enough potential members of the federal population (Chen, 2005). Hatcher (2017) declared that the quality of member services is associated with membership retention.

The theories relating to the basis on which this research rests are presented in greater depth in the conceptual section. This study used social identity theory, reference group theory, and the theory of cognitive dissonance. The cognitive dissonance theory could have helped analyze NARFE's retention and declining membership and draw inferences from other organizations to capture the rationale that weakened membership retention efforts. However, sufficient responses were not available to arrive at a conclusion. This concept and the social identity and reference group theory have provided insight into how the National Active and Retired Federal Employees Association (NARFE) reduced the decline in membership rate.

The review of the literature revealed influencing factors or weaknesses describing other associations that could have also influenced NARFE members to leave the association. It provided a conceptual framework as the basis of this study's analysis and a clearer view with which to interpret its findings. The review of the literature revealed what was already known about the topic of this study to indicate the need for this research project and where it conformed to what was formed from obtainable knowledge (Garrod, 2023; Jensen, 2017). Several

organizations with declining membership, similar to NARFE, with legislative issues were further described in the current content of this paper. Relevant references from the literature concerning the topic were essential to exemplify the separate strengths and weaknesses of each of the data collection methods intended to be utilized, as expressed by Bloomberg and Volpe (2019).

Associations and unions have, through individuals, independently come together in a formal organization to negotiate and advocate for the interests of their members. Much emphasis has been put on recruitment efforts to increase advocacy power and build respective coalitions (NARFE, 2024). The National Active and Retired Federal Employees Association, also referred to as NARFE, was incorporated under the laws of the District of Columbia on February 27, 1947, and protects the interests and welfare of federal employees as stipulated in the NARFE Bylaws (NARFE, 2024). The association of NARFE is a Nonprofit organization identified in 26 U.S.C. 501(c)(5), which provides for the exemption from federal income tax of labor, agricultural, or horticultural organizations and should not be considered a Union (IRS, 2023). NARFE intends to change or become a Non-profit organization, as identified in 26 U.S.C. 501(c)(3), which is a church. Members of NARFE may be able to deduct a contribution or donation of any funds given to NARFE from their taxes. At present, NARFE's membership fee is not deductible, and members have wanted a way to deduct the fee.

The NARFE organization is involved with other associations, such as the postal service unions, through a coalition seeking similar legislative goals as stipulated in the NARFE advocacy department (NARFE, 2024). This confirmation of other associations with similar advocacy issues stresses the importance of the National Active and Retired Federal Employees Association (NARFE) as the only association solely dedicated to safeguarding and enhancing the earned pay and benefits of America's active and retired federal employees and their survivors. NARFE has had a declining membership like other organizations, which has resulted in lost

membership and revenue, causing NARFE to be less effective in functioning as a lobbyist organization in its efforts on behalf of federal employees and retirees (Fowler et al., 2020; Harris, 2021).

Title Searches and Documentation

The researcher searched for relevant documentation in several databases, including peer-reviewed materials generally available through the University of Phoenix library, ProQuest, secondary website search engines, ScienceDirect, research texts, and Google Scholar. The researcher also pursued footnotes to acquire relevant sources. Keyword searches were the principal means of database searching. The researcher used the following keywords to obtain leads: Declining membership, Recruitment, Membership retention, Renewal, Joining, and Increased membership. The researcher used a general criterion to search each database. Sources were filtered to be scholarly/peer-reviewed and for current sources published between 2020 and 2025. When possible, peer-reviewed literature was used, but it must be noted that an exhausting research effort had needed peer-reviewed material for five years or less, and the research did not find peer-reviewed articles available in the past five years (see Table 1). A gap in the research was realized, and very little literature discussed a decline in many organizational or association settings. In addition, very little information was found that addressed the NARFE organization's affiliation with an organization experiencing a significant decline in membership participation.

Other publications of governmental agencies and organizations were examined and used in the literature review. However, the documents retrieved thus far from predominate and well-known organizations revealed knowledgeable and historical shreds of evidence that reflected an extensive period. Where peer-reviewed was unavailable, the value of documents from other predominant and well-known organizations had to be considered. Articles beyond the five-year or longer time frame explained the priority of relevant information. Further extensive research

would continue to gain access to peer-reviewed material available for this literature research. This literature research has used 129 peer-reviewed references plus various other articles, as Table 1 indicates.

Table 1

Literature Reviewed in Support of the Research Study

Types of Research Materials	Number	Peer Reviewed	Before 2019	After 2019
Journals	116	76	46	70
Articles	92	52	45	47
Books	15	1	4	11
Total	223	129	95	128

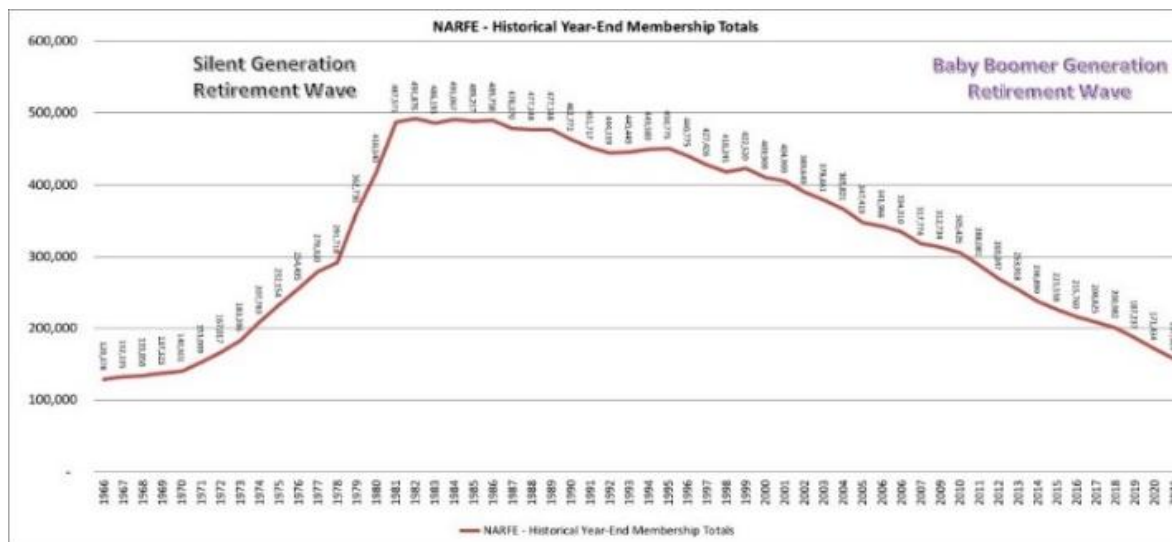
Historical Content

NARFE's Membership

Since its founding in 1921 by a group of 14 federal employees, the National Active and Retired Federal Employees Association (NARFE) has served as a key advocate for the rights and benefits of federal workers and retirees. Over the decades, NARFE grew into a prominent voice in Washington, D.C., representing the interests of the federal community through lobbying and public policy efforts. As shown in Figure 2, the organization reached its peak membership of nearly 500,000 in 1985. However, by the end of 2021, membership had declined significantly to 159,673 (David Bowman, personal communication, January 14, 2022). NARFE's mission is to protect the welfare and benefits of the federal community through its legislative advocacy. If the issue of declining membership remains unaddressed, the organization may face the risk of dissolution. This downward trend cannot be ignored, as it threatens NARFE's capacity to fulfill its core mission.

Figure 2

Historical Year-End Membership Totals



Organizations with Declining Memberships

When individuals join a non-profit club, an association, or a religious institution, there is one common factor: a reason for gathering. Generally, the reason is that individuals are committed to a bold, sharp purpose; otherwise, there is no connection with the group joined (Parker, 2020). Social networks and mobile internet are apparent features of daily life. They have contributed to a decline in some organizational memberships where interactions are not conducted over a participative face-to-face connection with others in a group setting but electronically (Li et al., 2022). This shift toward digital interaction has, in some cases, diminished the sense of community and belonging traditionally cultivated through in-person engagement. As convenience and immediacy take precedence, the relational depth that once motivated long-term membership commitment may weaken. Consequently, organizations must adapt their engagement strategies to retain relevance and foster meaningful participation in the digital age.

Although the functions of the following organizations are different, along with the IRS distinction, each was experiencing a decline in membership. There was also a relationship in that each association provided a learning experience to its members. Churches offer a religious learning experience, the Toastmasters organization provides a self-development learning experience, and NARFE has facilitated an advocacy learning experience with its members. Besides being different and having a learning experience in these organizations, they also have had declining membership. The following are associations with declining membership.

Numerous organizations, including associations, clubs, churches (501(c)(3), and other nonprofit groups, have struggled to maintain or expand their membership rolls in recent years. A rapid decline in both membership and participation has placed the survival and vitality of several of these entities at risk (Fowler et al., 2020). The Tampa Club, established in 1981, serves as a private civic and social venue for the business community of downtown Tampa, Florida. By 2013, the club began to question its long-term sustainability due to declining membership trends (Tompson et al., 2014). As a 501(c)(7) organization—designated for social and recreational purposes—its continued operation was contingent upon reversing this membership decline (IRS, 2023). Similar challenges are evident in the National Active and Retired Federal Employees Association (NARFE), a 501(c)(5) nonprofit labor and education association. Like the Tampa Club, NARFE relies on membership to fulfill its mission and faces comparable threats to its sustainability due to persistent membership decline.

However, NARFE is a specialized organization that serves only federal employees and annuitants within the federal community. As a 501(c)(5) labor and education association, it qualifies for federal income tax exemption under the IRS code applicable to labor, agricultural, and horticultural organizations. In contrast, the methodological case study of the Tampa Club was based on primary research conducted by faculty and student teams over the course of an

academic semester, with findings documented in their collaborative study (Tompson et al., 2014). Unlike the Tampa Club study, the NARFE research utilized participants drawn directly from within the organization, rather than relying on external researchers or students.

The decline in the Tampa Club membership was due to two trends: the recession that began in 2008 and the reduction of personal spending on this membership expense (Tompson et al., 2014). The changing demographics during that period, the economy, or the different generations of Americans may also have contributed to the decline in membership within this organization (see Table 2). This expense factor could also account for NARFE's declining position, as a recession could indicate that individuals may have dropped to save financial resources. In addition to economic issues and generational differences, individuals with extended club membership resigned because the club did not produce enough value for members to maintain membership (Tompson et al., 2014). Research has also shown that membership retention can be based on the satisfaction of its members when an organization provides the desired service, and an individual's satisfaction is positively related to retention (Behrey & Patron, 2008). A needs assessment research study has addressed the decline in membership, and the research has collected data to determine the reasons.

Similar membership challenges are not limited to social and professional organizations but are also evident in religious institutions. Webb et al. (1998) asserted that churches of many denominations have experienced a steady decline in membership since the early 1970s. A study by Gutmann and Peters (2020) projected that church membership could be reduced by half by 2060 compared to the number of members recorded in 2017. Churches are only as resilient as their members and rely on them for both financial contributions and volunteer service to remain operational (Blount, 2023; Jones, 2021). Retaining existing members and attracting new ones is therefore critical to ensuring the sustainability and growth of such institutions (Blount, 2023;

Webb et al., 1998). The National Active and Retired Federal Employees Association (NARFE) is facing a similar challenge, as declining membership has weakened its lobbying influence on behalf of federal employees and retirees, resulting in decreased revenue and organizational effectiveness.

To effectively engage parishioners, churches must identify and reach distinct market segments, as attendance is influenced by several demographic factors, including generation (see Table 3), marital or relationship status, gender, education, and age (Kortt et al., 2017; Johnson, 2022; Webb et al., 1998). Despite targeted outreach, church attendance has declined for decades in the Western Hemisphere, a trend that continues to pose significant challenges for religious institutions globally (Franck & Iannaccone, 2014; Harris, 2021). However, not all religious organizations are experiencing a decline. Some churches have reported increases in membership and participation, suggesting that while broad patterns indicate contraction, notable exceptions exist (Franck & Iannaccone, 2014). These contrasting trends highlight the need for further exploration into the factors contributing to growth in certain congregations. Identifying and adapting these successful practices may offer strategic insights for membership-based organizations such as NARFE, particularly as it seeks to reverse its own decline.

Membership decline is not limited to religious or civic organizations; professional associations across various fields have also faced similar challenges in sustaining and growing their membership bases. Compared to declining membership in NARFE, the Advanced Practice Registered Nurses Professional Association (APRNs) has also experienced a decline in membership and growth. In a sample of 150 advanced practice registered nurses (APRNs) who were past and nonmembers, a questionnaire of 34 questions, with groupings by benefits and barriers, revealed that less than 50% felt the membership cost was a barrier (Walton, 2017). In addition, Walton (2017) discovered that other factors for nonparticipation in a professional

organization were undesirable location, time limits, family obligations, and lack of awareness of the nature of the organization. One significant note by Walton (2017) was that the study results indicated that 71% of the 150 participants considered continuing education to be of more significant benefit when considering joining a professional organization. Factors that contribute to advancement within an organization can be a positive element for retaining membership.

Another professional association that experienced a decline in membership was the American Bar Association (ABA), a long-standing organization serving legal professionals. In response to this trend, the ABA initiated several strategic efforts to reverse the decline and enhance member engagement (Venzin, 2019). Beginning in 2017, the association conducted a comprehensive pricing study, administered member surveys, and facilitated in-person and virtual focus groups. These research efforts revealed critical insights that substantially overhauled the organization's membership model. As a result, the ABA introduced a redesigned pricing structure, a more personalized membership experience, and expanded access to educational resources and member services. While organizations such as the ABA have successfully reimaged their membership strategies, labor unions have faced more complex challenges related to sustained membership and representation, particularly in shifting political and economic landscapes. NARFE has done extensive past surveys to evaluate its services in an attempt to restructure its method of recruiting, retaining, and renewing members. The purpose of the study was to exhaust gaining responses to the four guiding research questions that addressed the research problem.

Farber and Krueger (1992) found that 1977 unionization declined to 21.7 percent of the labor force. This decline fell to 15.5 percent by 1984 and 11.9 percent in 1991. Later, Rosenfeld (2007) conducted a quantitative study examining the significant effects of the decline of labor unions in the United States since the early 1980s. The decline of labor unions and the NARFE

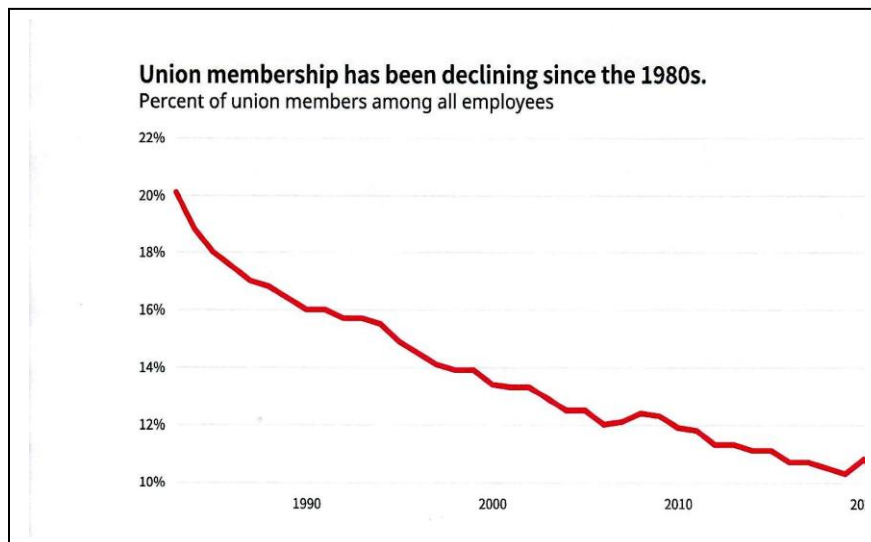
organization is also declining. However, this quantitative analysis targeted the role of union decline in pay inequality across occupations. Rosenfeld (2007) argued that union existence within the workplace narrows the wage disparity, essentially affording substantiation of the power of unions to impact pay standards within a firm. Hatcher (2017) pointed out that increasing union membership could improve employee representation and protect workers' rights and bargaining power. There is a similarity between how the NARFE association has represented protecting members in advocacy and where unions represent and protect members in negotiations for better wages. In contrast, each has a mission to represent its members.

As claimed by Hatcher (2017), Mizruchi and Hyman (2014), and Sarkar and Chakraborty (2021), the decline in labor union membership has lasted more than four decades since 1954 (see Figure 3). The market decline, globalization, technology, and polarization have contributed to declining union representation and membership. There are claims that membership decline leads to the inability of some union leaders to retain union members, resulting in a loss of profitability (Rivers, 2014; Union, 2017). Unions in a financial dilemma are similar to the financial circumstances that the NARFE organization faces. Some studies have challenged the underlying assumptions of the economic policies that have deliberately undermined collective bargaining and trade unions (Union, 2017). However, three variables were used in Hatcher's (2017) conceptual framework: demographic, recruitment, and collective bargaining factors that were felt to contribute to the decline in union membership.

Leadership in conducting business within an organization is a consideration that could be influencing membership decline, as illustrated in the case conducted by Fowler et al.(2020), where the researcher concluded that the senior leader's ineffectiveness in giving a sermon was one primary factor in the church's decline in its congregation. Similarly, in another quantitative study on *Trust in union leaders and the decline in union membership*, Francois (2017)

Figure 3

Percent of Union Members Among All Employees



identified leadership misconduct and a lack of trust as key factors influencing declining union membership. Francois needed to measure the differences and relationships between union leadership and the effect of membership decline. In addition, prior researchers pointed to leader misconduct and members' lack of leadership trust as a cause of the loss of union membership. Addressing such issues through rigorous quantitative methodology requires thoughtful data collection, data-analytic strategies, and a structured approach to inquiry (APA, 2020). In contrast, Hatcher (2017) asserted that some union leaders lack effective strategies for improving member retention and that demographic factors also influence union participation. Rosenfeld and Kleykamp (2009) found that Hispanic populations tend to join unions at higher rates than other demographic groups, suggesting that targeted engagement strategies may be necessary. Similarly, Elkins (2019) observed that a lack of trust in leadership contributed to decreased member involvement and participation within the Toastmasters organization.

Current Content

NARFE's Membership

Because NARFE's membership declined, it experienced challenges in its lobbying efforts. The increase in membership the organization gains will enhance the number of members the lobbyists can represent, and the lobbyists can support the legislation for or against the benefit of its members and assist with legislation. Cline et al. (2019) presented three reasons for membership and how it could support the individual. Members can contribute to the organization's mission and support legislative advocacy efforts when given current legislative information that needs immediate attention or action when contacting constituent representatives. NARFE has a legislative action center whereby members can urge their congressional representatives to co-sponsor and support or oppose a pending bill affecting constituents' benefits. A member can write a personal letter and send it via postal or email. NARFE provides a sample-generated, formatted written letter that can be edited and used.

In addition, NARFE (2024) had a page on its advocacy website that informed all members about the representatives and senators seeking re-election to Congress and how legislators have represented the concerns of active and retired federal employees. NARFE published this Voting Scorecard of the 2017-2018 115th Congress (Voting Scorecard, 2017) and the 2021-2022 Voting Scorecard of the 117th Congress (Voting Scorecard, 2021). A diverse range of voices enhances representation and influence within government decision-making processes. NARFE members benefit from dedicated advocacy representation in Washington, DC, provided by the organization's staff. A key distinctive competency that positions NARFE advantageously over similar organizations is its professional advocacy team (Paul & Donnelly, 2019). Additionally, members can engage in grassroots activism at the local level, actively

participating in congressional districts to further the organization's legislative objectives (NARFE, 2024).

NARFE needs to understand the internal programs that produce incentives to increase membership and revenue (such as offering informative webinars at the application fee amount) and an external investigation into how to maintain membership. Presently, NARFE's regular revenue funds include membership dues, program fees, and vendor support from business partners. Individuals can also affiliate with the NARFE organization by donating to their Silver Circle program, directly contributing to the organization through a defined membership program, or both (Requa, 2023). There is a desire for NARFE members to join other federal-associated associations in supporting a cause that can result in more significant donations, as presented by Powell and Bromley (2020).

The research study suggested looking into NARFE's evaluation of its technique for attracting prospective members while retaining its current members by looking closely at the value of NARFE's services (NARFE, 2024). In the face of declining membership, the leadership's role became even more crucial because leaders are responsible for working with the staff, adopting innovative ideas, and finding solutions to retain former members. Leaders are challenged not just to maintain the status quo but also to adapt to this changing landscape. As Northouse (2018) asserted, a leader's role is to guide others through complex tasks and help them find solutions. This underscores the importance of leadership in steering NARFE through these challenging times.

Further investigation into the examination of recruitment strategies will help improve sample membership growth. NARFE will need to improve internal operations to process members' renewals and programs to increase membership through media, emails, or face-to-face

interactions. NARFE's assessment of its services and the needs of its members is necessary to continue the business.

Organizations with Declining Membership

Compared to NARFE, the National Association of Retired and Veteran Railroad Employees (NARVRE) has a mission statement: "To protect, promote and preserve your railroad retirement annuities" (NARVRE, 2024, p. 1). This association must advocate for preserving its railroad retirement benefits through advocacy avenues. NARVRE (2024) informed members of any disturbing occurrences affecting their retirement through a monthly newsletter and its legislative representatives. However, during the period when there was a coronavirus pandemic, there was also a decline in membership. Since then, NARVRE has devised strategies to recruit new members, such as membership drives and events. One way NARVRE is striving to keep existing members was by sending reminders to them to pay their membership dues.

The National Association of State Retirement Administrators (NASRA) is a leading association of public pension administrators that manages contribution plans and oversees pension fund assets. NASRA is a non-profit association IRS 501(c)(3) whose members are the directors of the nation's state, territorial, and largest statewide public retirement systems. Their position is to manage contribution plans and oversee pension fund assets. There was a focus on proposed legislation that would substantially affect the disability retirement program of its members and the system's leadership roles, and the approach to address this concern was to conduct outreach, including interactions with unions, associations, employees, employers, and the state legislature, which resolved the situation (NASRA, 2027).

Looking back on history, you will find other associations working for legislation to help its members. With nearly 150 years of industry and public policy experience, the American Retired Association (ARA) members of its government affairs team related to legislation, legal,

and regulatory expertise have gained from working in Washington, DC for federal agencies and other national associations a wealth of expertise in dealing with legislation (ARA, 2024). The ARA, a 501(c)(8), strives to pass legislation reinforcing policies to allow every working American a comfortable retirement. ARA has an active grassroots lobbying campaign on pending federal and state legislation that has been determined to be of concern to its members.

Humans are a social species; some typically struggle to belong to social groups that offer them belongingness and self-worth, such as churches (Renström et al., 2021). However, other affiliations feel differently about that premise. For instance, Alper et al. (2023) claimed that Americans are becoming less affiliated with organized religion, causing less attendance and participation. It is speculated that Americans may be turning toward their mix of spiritual aspects and avoiding being members of a religious organization for various reasons. The issue of non-attendance in organized churches aligns with the declined membership in NARFE and the financial deficits experienced.

Some other associations and organizations have declining membership issues but do not face the same legislative or advocacy situations that require representation in Washington, DC., as it does for NARFE. An example is the American Retired Association (ARA), where members of its government affairs team related to legislation have gained from working in Washington, DC, for federal agencies and other associations a wealth of expertise in dealing with legislation. These others have a primary membership problem as NARFE has concerns, which are illustrated below.

A case study was conducted by Fowler et al. (2020) of the protestant church members and the senior leadership to determine why this decline was occurring. This protestant church was located in the Bible Belt of the United States and witnessed a decrease in membership from

5,000 to 2,000 members over five years. At weekly church appearances, only 350 parishioners per week showed up, which could have accommodated twice as many (Fowler et al., 2020).

The researchers conducted interviews with current and former members following an assessment of the strengths and weaknesses of the staff and leadership. Additionally, they performed an extensive review of relevant literature using multiple databases to investigate the issue of declining membership. The researchers concluded that the senior leader was one primary factor in the congregation's ineffectiveness due to a decline “in the focus of delivery and vivacity in the message being administered to the public” as the sermons lacked an awe-inspiring delivery (Fowler et al., 2020, p. 215). In retrospect, the responses to the NARFE survey indicated that leadership was a factor in declining membership. Another factor affecting the congregation members was the level of participation the members chose based on the benefits offered to them (Gruen et al., 2000). Gruen et al. (2000) and Blount (2023) found that the members' participation was more enjoyable when members were offered opportunities that presented activities they could interact with. In contrast to other organizations' research, Chen (2005) found that it was apparent that members interacted more when activities fulfilled their needs. Gover (2022) asserted that members' participation in church-related activities indicated the impression of members' loyalty and commitment to the church organization. According to Fowler et al. (2020), the church encouraged participation by offering men's and women's Bible studies programs, “Mother's Day out, senior citizen musical ensemble, rhythm band, choir, praise team, orchestra, theater, technical team ministries, life groups (Sunday school), shut-in ministry, preschool, and youth groups,” all of which can influence successful multiple family activities (p. 208). Activities implemented by the church were shown to support successful commitment to the organization. Similarly, incorporating family-oriented initiatives may serve as a potential strategy for strengthening members' commitment within NARFE.

Another factor related to the church's lack of youth was that the church needed to target the youthful population. In comparison, NARFE is in the same situation where there is a need to attract younger professionals to replace the older members. The church needed to go after the youthful population by offering services or products that raise attention and appeal to newer generations (Fowler et al., 2020). According to Gover (2022), it is thus evident that there should be more research into behavior in this area to question individuals' reasons for participation in church activities, a similar action that NARFE could take that will help to retain membership. There are similarities and comparisons between church participation and opportunities offered to members, as other organizations and NARFE assist members in the services offered. Evidence also points to the fact that there should be more research into behavior in this area to question individuals' reasons for participation in church activities, as it would reasonably be fitting for NARFE to explore (Gover, 2022). NARFE acquired data responses from the survey that related to a behavioral issue of why members were inclined to drop their membership.

Financial and time limitations were also identified as deterrents to retaining membership, along with a supposed lack of membership benefits and inadequate association management (Huang et al., 2022). Using strategies could help achieve recognized goals and is a critical element in the realization and survival of organizations (O'Brien et al., 2019). Research conducted by Morrison and Misener (2022) addressed a strategic approach to membership growth in a nonprofit community sport, and the focus was to develop membership growth strategies to maintain quality programming that encourages retention. These researchers also claimed that “five participating clubs reported a declining membership trend, six reported a stable membership base, and four reported an increasing membership trend” (p. 423). Following an extended period of interviews, the researchers concluded that a strategic action plan to enhance the sport’s visibility within the community should involve establishing a stable and

active membership base. This would be achieved by attracting new members by developing and implementing targeted membership growth programs and initiatives (Morrison & Misener, 2022). The findings suggest that the relationship between organizations and their membership activities is significantly influenced by the support offered, the range of services provided, and the perceived value of participation factors that encourage both initial enrollment and long-term member retention. Given these dynamics, it is especially important to consider how younger generations perceive and engage with membership-based organizations, as their participation is vital to sustaining future growth and relevance.

As younger professionals enter the workforce, their motivations for joining associations often center on career development, networking opportunities, and the potential for upward mobility within their chosen fields (Huang et al., 2022). One organization that has historically appealed to these motivations is Toastmasters International, which offers leadership training, public speaking opportunities, and personal development programs. Toastmasters International is a career development organization that develops individuals looking to improve their leadership ability and effectively communicate through participation in a decision-making process (Elkins, 2019). The first unofficial Toastmasters meeting was held on March 24, 1905. Since then, the organization has relocated and is now headquartered in Englewood, Colorado, with approximately 270,000 members in more than 14,200 clubs in 148 countries (Toastmasters International, 2023). In any given year, up to 40% of current Toastmasters members would not renew their memberships. Elkin (2019) explained that some reasons for nonrenewal were time constraints, conflicting work hours, and family matters, which can be found additionally within the NARFE organization. Through qualitative measurements, Elkins (2019) explored whether internal factors like club-changing aspects or leadership influenced club retention attempts.

Leaders in Toastmasters International also wanted to identify the emotional, personal, and persuasive factors influencing membership renewal (Elkins, 2019). Festinger's theory of cognitive dissonance (1957) was the theoretical basis for engaging in this Toastmasters club's study. Morvan and O'Connor (2017) wrote an analysis of Leon Festinger's theory of cognitive dissonance and noted that Leon Festinger "hypothesized that incomprehensible or illogical behaviors might be caused by a cognitive drive away from dissonance, or internal contradiction" (p. 5). Elkins (2019), while exploring Toastmasters International, found that there was a membership connection with the theory of cognitive dissonance, which implied that people find their feelings are different from their reality as they reflect on their behavior. Enduring what Toastmasters is up against in retaining membership, NARFE may also be subjected to and need to retain membership, which may entail understanding the emotional and non-emotional cognitive factors that control a member's decision not to renew their membership. This may be known through understanding a member's perspective about renewing their membership. The primary reasons for non-renewal in Toastmasters were moving or personal circumstances. A deeper examination of these personal reasons could have uncovered significant issues and conflicts within the club that contributed to membership non-renewals (Elkins, 2019).

As noted earlier, a survey conducted by the Pew Research Center, which examined demographic differences, found that nearly six in ten U.S. adults view the significant decline in union membership over recent years as detrimental to both the "country (54%) and working individuals (59%)" (Van Green, 2024, p. 1). The disparity of the survey is that it only asks the question: Do you think this reduction in union representation has been mostly good or bad for the country? No other question was asked in the survey as to why they provided that answer, yes or no. This leaves a doubt about the reasons behind the yes or no answer, which might contribute to clarifying this issue if more information was included.

The organizations previously discussed have demonstrated patterns of declining membership. These trends reveal important factors such as motivation for joining, levels of member satisfaction, and retention challenges, all of which may be influenced by generational differences. These factors are outlined to provide insight into the motivation behind individuals' decisions to join organizations. Membership satisfaction also plays a critical role, often significantly contributing to member retention. Among the three reasons for joining, satisfaction and retention may represent the most significant factors for sustaining NARFE's long-term viability.

Reasons for Joining Organizations

The social identity theory model visually represents how personal identity transitions and interacts within various social groups. Social identification is one of the major foundations for participation in social activities, and the reaction may be understood as belonging to the organization and becoming a member (Tudor & Petre, 2021). As Misener et al. (2020) attested, membership-based associations are essential to their local communities and the complete social influence of the nonprofit sector. Belonging to a social category, such as a Nonprofit professional organization (NPMO), is valuable for professional development, networking, and legislative advocacy resources (Whitney & Gale, 2015), which is an essential resource for NARFE and its mission. White's (2005) research revealed that people join organizations for various reasons. The reasons for affiliation, participation, and membership extension in professional organizations, associations, and social groups have been unexplored. However, professional associations provide an essential affiliation and standpoint for knowledge development, engagement, collaboration, community-building, and an appreciation of professional distinctiveness (Huang et al., 2022). As noted by Walton (2017), study results in a sample of 150 advanced practice registered nurses (APRNs) indicated that 71% of the 150 participants considered continuing

education to be of more significant benefit when considering joining a professional organization. Factors that assisted in upward mobility and contributed to advancement within an organization could be a positive element for retaining membership.

In comparison, the NARFE organization members could have the opportunity to be actively participative and more involved at the local level as grassroots activists in their congressional district, as well as be engaged in other advocacy programs for community-building. Membership organizations that deliver quality programs have created more opportunities to develop stronger affective attachments among the members (Gruen et al., 2000). If the benefits of professional membership are not more significant than the cost, people are not likely to join or renew their membership (Walton, 2017). Members were drawn to the organization's goals and values and the organization's mission as a whole (Gruen et al., 2000). Members needed a worthwhile value proposal that gave them reasons to join and aligned with the nonprofit's mission (Requa, 2023). Similar to NARFE, associations are mission-driven organizations. The development and maintenance of programs are essential in advancing the organization by delivering value to its members. These programs can serve as a compelling reason for individuals to join or retain membership in an association (Zeimet, 2019).

Member Satisfaction and Retention

Gruen et al. (2000) stated that membership length, donating, and involvement in related interest groups or associations lessen the prospect of lapsing or not renewing their membership (e.g., museum memberships). For NARFE, Gruen et al. (2000) are correct, whereby participation is important, and members who participate are the individuals who remain longer in the organization. Membership participation is the extent to which the membership utilizes the association's services. In contrast, the NARFE organization has a Federal Benefits department to assist members with questions and problems with their annuity, health, benefits, or welfare.

NARFE members can gain knowledge, advice, and instruction by participating in webinars that benefit them, which are archived for future reference. Research has shown that retention can be based on the satisfaction of its members when an organization provides core services, and satisfaction has been found to be positively related to retention (Behrey & Patron, 2008).

Many nonprofit organizations have considered volunteer retention a vital consideration. NARFE is no different, as volunteers from the local and state membership fill officer positions. NARFE has had local chapters where members gather to support and work toward the association's objectives (NARFE, 2024). Regarding satisfaction, Garner and Garner (2011) indicated that satisfaction was related to volunteer retention for these participants. Members who can be involved in the chapter's work gained appreciation and pride. Volunteer retention is an essential challenge for many nonprofit organizations, as volunteers do not receive compensation. One might expect that other types of satisfaction (efficacy and empowerment), such as having a leadership officer position in the chapter, might also lead volunteers to remain with the organization (Garner & Garner, 2011). The membership application fee or dues represent an investment in the association's services, motivating members to recover their investment (Gruen et al., 2000). The mission statement provides members with a clear understanding of the association's goals and can drive membership recruitment and retention by emphasizing the protection of benefits through advocacy (Zeimet, 2019). Generational differences can impact various aspects of life as people age and can be a factor for membership recruitment and retention.

Generational Differences

There is a need to realize that an individual's age is one of the most common predictors of differences in attitudes and behaviors (Wey Smola, & Sutton, 2002). Generational differences can be a factor based on the generation most prevalent in the organization that can affect the

derived policies. Table 2 illustrates the number of births of each generation. According to Jones (2021), church membership was sharply connected with age, as 66% of traditionalists (e.g., U.S. adults born before 1946) belong to a church, matched with “58% of baby boomers, 50% of those in Generation X, and 36% of millennials” (p. 3). This decline in church membership appears to be tied to population change. The change has become apparent in church membership rates, as illustrated in Table 3 (Jones, 2021). Age could be a factor in the NARFE organization as the majority of members are over 70, with an average age of 80 (NARFE, 2024). Those in this age bracket are Baby Boomers, who have traditional values and social norms and focus on family and community (Wey Smola, & Sutton, 2002). Consequently, the decline in registered membership would be only about one-third due to demographic change (Gutmann & Peters, 2020). We know that time does not stand still. As can be seen, as so often is assumed, differences exist among the generations. This research indicates that, in addition to these generational differences, our values change over time within generational groups due to our societal environment and, to a lesser degree, the evolution process of individuals. As seen in Table 2, there have been different generations over many years, reflecting on our attitudes and behaviors as described in each of the above generations (Wey Smola & Sutton, 2002).

Table 2

Births Underlying Each Generation

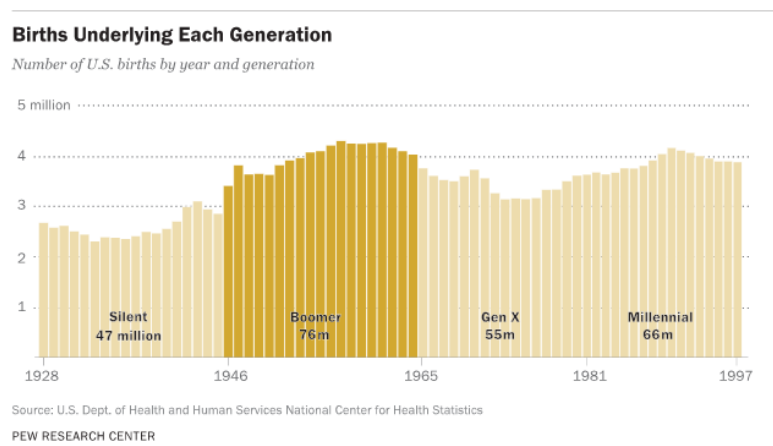


Table 3*Changes in Church Membership by Generation Over Time*

	1998-2000	2008-2010	2018-2020	Change since 1998-2000
	%	%	%	%
Traditionalists (born before 1946)	77	73	66	-11
Baby boomers (born 1946-1964)	67	63	58	-9
Generation X (born 1965-1980)	62	57	50	-12
Millennials (born 1981-1996)	n/a	51	36	n/a

Note. Table 3's results for this Gallup poll above are based on telephone interviews conducted in 2018-2020 with a random sample of 6,117 adults aged 18 and older living in all 50 U.S. states and the District of Columbia. The following are some background and explanations of these generations and their effectiveness. A generation is considered to be about 20–30 years, during which children are born and grow up, become adults, and begin to have children.

Baby Boomer Generation

According to Thompson et al. (2014), members born between 1946 and 1964 with a median age of 62-72 years are baby boomers. Boomers have a stronger belief in managing their own lives and “value hedonism significantly higher than the pre-war generation” (Slagsvold & Hansen, 2021, p. 12). This generation is decreasing and comprises the majority of membership in the NARFE organization. Slagsvold and Hansen (2021) stated that most Baby Boomers are digitally ignorant, meaning they are reluctant to accept the computer world, whereby they are not using and accepting emails. NARFE needs this generation to respond to digital political action initiatives when congressional bills can affect their benefits and welfare. Slagsvold and Hansen (2021) based their data on the Norwegian study of Life-course, Aging, and Generation

(NorLAG). Baby boomers are becoming a minority who actively participated in political activities at the time; most were influenced by cultural and social changes but from different locations and ways (Slagsvold & Hansen, 2021). The NARFE organization has an average age of membership in the high 70s or higher, indicating that the generation of members in this organization is mostly baby boomers.

Generation X

This generation was born between 1965 and 1977. This generation was highly educated and more technologically forward-thinking (Slagsvold & Hansen, 2021). Generation X spends most of their time with their children, and finding work-life is a priority for this generation, with being a member of segment for private clubs.

Generation Y

Generation Y, the Millennial Generation, was born between 1978 and 1994. This was the first generation known as digital subjects since being surrounded by technology. This generation regarded the activities they frequented as additions to their living and dining rooms. They enjoyed focusing on family time, congregating with friends, and forgoing an outside gathering environment (Slagsvold & Hansen, 2021).

The effects of growing up in a technological environment are coming into focus, where Generation Z is now in position. Generations Y and Z share attributes in many viewpoints, as both generations are recognized as being environmentally and politically conscious (Kim & Austin, 2020). NARFE could explore the benefits of recruiting these two generations for the advocacy mission. The question is how NARFE can achieve this.

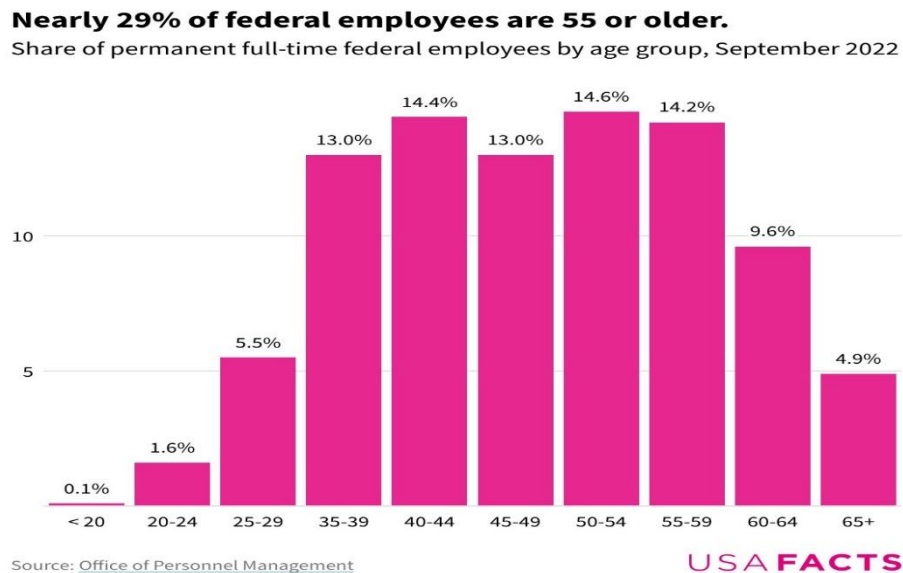
Research has shown tremendous changes in youth behaviors, attitudes, and lifestyles for those who came of age in this era (Dimock, 2019). With so many generations to contend with, it leaves many challenges for soliciting a diverse society to join a membership association. The

primary means by which people connect are the web, mobile devices, WiFi, and high-bandwidth cellular service, which leaves very little room for involvement in social gatherings. Generations are a lens through which to understand societal change (Dimock, 2019).

Another fact is the number of federal employees in the workforce and the number of age differences. In 2022, the average age of the federal workforce was 47.2. The average age increased by 0.9 years between 2000 and 2022 (USA Facts, 2023). These figures, as shown in Figure 4, in contrast with the generation gaps, illustrate the potential of prospects who could be members of NARFE. The age to retire from the federal workforce is 55 or older with 30 years of service. With 29.1 percent of the workforce over the age of 55, this would indicate that 70.9 percent are younger and potentially able to be members while employed as federal workers in the federal government.

Figure 4

Share of Permanent Full-Time Federal Employees by Age Group, September 2022



Conceptual Framework Literature

A qualitative needs assessment research was conducted because of its purpose and narrative style to efficiently present qualitative data and serve as the conceptual framework for

this research study (Herr & Anderson, 2014). The data were developed using an online survey consisting of open-ended questions (e.g., one from prior members who have ceased to continue as members and one from those who have been loyal members), incorporating participant comments from both dropped and renewed members and some interviews. Data accumulated from an online survey allowed for the triangulation of information on the experiences of former members and current members to share with the NARFE organization, potentially revitalizing recruiting efforts for growth and maintaining membership to reduce the decline.

An individual survey was conducted to address questions related to each participant's status. James and Slater (2014) mention that qualitative methods involve working with people to gather data, "often in the form of words, and are useful when you want to explore human experience" (p. 8). A qualitative method addresses a social problem by understanding participants' opinions, perceptions, and feelings or reviewing documents (University of Phoenix, 2020).

Theories and concepts that framed the study included organizational systems theory, which examined how things go wrong in organizations (Ramsey, 2022), and organizational learning theory, which "investigates the role of task conflict in cooperative innovation projects" (Mu et al., 2021, p. 236). From a cognitive perspective, individual learning encompasses the processes of storing, retrieving, transforming, and applying information to facilitate understanding and decision-making (Fauske & Raybould, 2005). Additionally, research on retention theory, which emphasizes strategies designed to retain customers, offers valuable insights relevant to organizational membership and engagement (Capponi et al., 2021). These conceptual frameworks address the overarching research questions related to membership retention, recruitment, and renewal. The theoretical foundation of this study is further supported

by social identity theory, reference group theory, and the theory of cognitive dissonance, each of which provides a distinct lens for examining member behavior and organizational affiliation.

Social Identity Theory

The social identity theory of intergroup behavior identifies a person's knowledge of belonging to a social category (Stets & Burke, 2000). This theory was formulated by social psychologists Henri Tajfel and John Turner in the 1970s and the 1980s and introduced the concept of social identity to explain intergroup behavior (Turner, 2010). Further findings were explained on how useful this was for this study.

Social identity theory contributed to this study by offering a framework for understanding how individuals perceive themselves as belonging to a particular social group or category. This perspective was valuable in examining how members identify with organizations such as NARFE and how that identification influences their decision to join, remain, or disengage from membership (Stets & Burke, 2000). In addition, social identification served as a foundational element for understanding participation in collective activities, reinforcing the importance of member retention within organizations. This concept is reflected in NARFE's approach, as the organization has maintained a substantial membership base, accumulating nearly 500,000 members over the past 50 years, and actively promotes engagement through social meetings, conferences, and participation in legislative events.

The social identity theory also suggested that when an individual senses an addition of self as part of and received due to joining a specific group, it furthers the extension of self, which is reinforced through the acceptance of standards gained from group membership (Harris, 2021). Being relevant to NARFE, this social identity theory posits that individuals tend to join groups where joined values and beliefs are upheld and akin to the individuals' beliefs (Mitchell, 2022). The role of social identity in group attendance could acquire new growth and retention of

knowledge (Mitchell, 2022). With social identity theory, if an organization focuses on ethical behaviors, most group members will copy these behaviors (Cai et al., 2024).

Reference Group Theory

Building upon this perspective, reference group theory expands the understanding of social influence by examining how individuals shape their beliefs and behaviors in relation to specific social groups. Individuals do not form attitudes, beliefs, or behaviors in isolation; rather, they are influenced by groups that serve as comparative and normative frameworks for self-evaluation and social positioning. The concept of reference groups was first introduced by sociologist Herbert Hyman in his 1942 monograph, *The Psychology of Status*, where he proposed that individuals' attitudes and behaviors are significantly shaped by the groups to which they belong or aspire to belong (Beeghley et al., 1990; Oxford Reference, 2024). This theory continues to offer valuable insight into how social environments shape member engagement, identity, and participation within organizations.

Building on Hyman's foundational insights, reference group theory ascertains the situations under which individuals use their association groups as frames of reference. For example, peers within a federal working group may rely on one another as reference points when deciding whether to join an organization such as NARFE, especially if a colleague already affiliated with NARFE serves as a credible model or influence. However, it does not provide much assistance with how individuals choose among other participating groups (Beeghley et al., 1990). In addition, reference group theory was limited to only offering a comparison that supported an individual participating within their social environment (Sherif, 1953). NARFE is a social environment conducive to advocacy, and this theory supported the research and indicated reference by supporting legislation with each other. To further expound, Robert K. Merton, described as a founding father of the sociology of science, hypothesized that individuals

associate themselves with reference groups of people who reside in the social role to which the individual seeks. NARFE members associate themselves with the reference groups with the same references in support of legislation and the protection of their benefits. There are several reference groups, normative reference groups being the basis of an individual's standards and values, while comparative reference groups are those to which individuals compare themselves during self-appraisal (Nickerson, 2024). Reference groups have several functions: They can offer people a foundation for reference to appraise their attitudes and beliefs, in which case they decide on them (Nickerson, 2024).

Theory of Cognitive Dissonance

Leon Festinger (1957) introduced the cognitive dissonance theory, and this theory is still debatably pertinent. Festinger described cognitive dissonance as occurring whenever people are challenged with evidence contradicting their beliefs, values, and ideas; they will succeed in settling the paradox to diminish their uneasiness (Ayhya & Sukmayadi, 2020). A further direction was to use Festinger's cognitive dissonance theory as the theoretical basis of the research design. This theory underscores that an individual constantly attempts to uphold consistency by using his or her cognition (Chatterjee et al., 2023). Cognitive dissonance theory suggests that individuals strive to maintain internal coherence among beliefs, attitudes, and behaviors. For instance, when a member of NARFE identifies with a legislative reference group, alignment with that group's stance on a legislative bill may be rationalized to reflect personal values, thereby reinforcing consistency within the individual's self-concept.

Cognitive dissonance theory was applied to examine standardized data related to current and non-renewing members of the Toastmasters organization. The results revealed the opinions, perceptions, perceived advantages and disadvantages, and overall experiences of current and former members, as reflected in their responses to the research questions. As explained earlier,

Elkins (2019) expounded that cognitive dissonance is when people find their feelings are different from their reality as they reflect on their behavior. Enduring what NARFE is subjected to in retaining membership could have required an understanding of the emotional and non-emotional cognitive factors that influenced a member's decision not to renew their NARFE membership. For example, some responses gave an emotional response to a research question on whether to renew. This process aligned with this researcher's objectives, which were intended to offer a conceptual framework of how the theory of cognitive dissonance remained relevant in current society (Yahya & Sukmayadi, 2020). According to Creswell and Creswell (2018), the findings from the responses provided a fruitful understanding of the underlying forces that drove non-renewal decisions among current and former members. NARFE could benefit from the results of a cognitive dissonance theory if the survey questions provided sufficient data to warrant applicable responses for understanding the participants' perceptions. The theory of cognitive dissonance was intended to explain and foresee post-decisional behavior. However, in most instances, it was not sufficient to explain a person's behavior before making a decision, such as why not remain a member (Oshikawa, 1969).

Methodology Literature

A comprehensive body of research has examined membership decline, emphasizing both the methodologies used and the resultant findings. This section synthesizes the existing literature, emphasizing its contributions to the field and reinforcing the rationale for the methodological approach adopted in the current study. Festinger's theory of cognitive dissonance (1957) was the theoretical basis for engaging the Toastmasters club's study's described by Elkins (2019). The underlying reason found for non-renewal in Toastmasters was moving or personal reasons. The Toastmasters organization aimed to uncover current and former members' opinions, perceptions, advantages and disadvantages, and experiences. Festinger's theory of cognitive dissonance

(1957) was the theoretical basis for engaging the Toastmasters club's study. Toastmasters International wanted to identify the emotional, personal, and persuasive factors influencing membership renewal (Elkins, 2019). Elkins (2019) further explained that Cognitive Dissonance implies that people find their feelings are different from their reality as they reflect on their behavior. Enduring what NARFE, without knowing, may have been subjected to in retaining membership may have entailed understanding the emotional and non-emotional cognitive factors that control a member's decision not to renew their NARFE membership. Furthermore, Ribeiro et al. (2021) stated that commitment to the organization represents a sense of alignment members feel between their values, desires, and attachments.

The Gruen case study, using the relational exchange theory as a guide, found that members who participate remain longer in the organization. The exchange theory helps explain whether individuals join and remain in an organization. Walton (2017) did a quantitative descriptive study using the Professional Association Membership Questionnaire (PAMQ) on APRNs to determine the barriers to why they did not participate in professional organizations. A Likert-type scale instrument was administered for this project and used to gauge a person's attitude, values, and opinions. Olson's (1971) exchange theory is the most frequently cited theory related to professional association membership. This theory is popular due to its logical and coherent nature, but it has limitations as it can only explain some behaviors associated with joining, not all. It is most applicable to groups or organizations that provide material incentives for membership, although other factors, such as social and psychological objectives, may also drive joining behavior. Exchange theory emphasizes the exchanges between groups or social systems. It suggests that individuals can contribute to and benefit from their overall participation by engaging in a social system characterized by loyalty and sharing. Narfe has members volunteering to participate in advocacy issues when contacting their legislative representative.

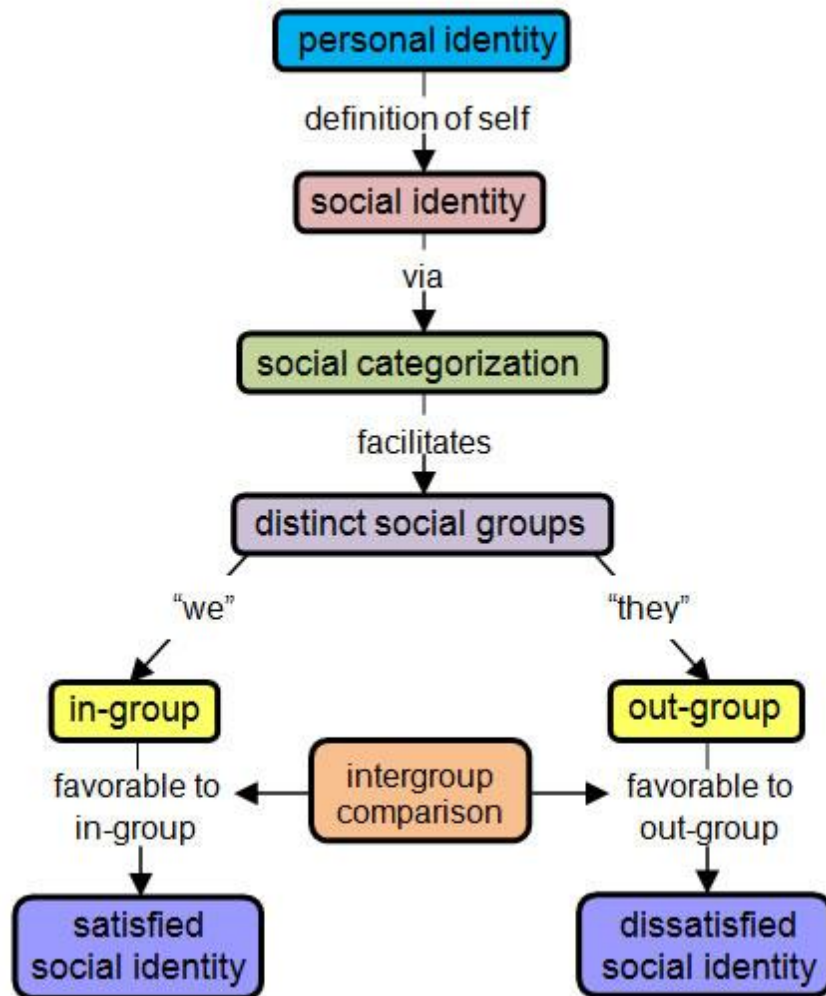
There is also the social aspect when using the NARFE community network (FEDhub) on the computer (NARFE, 2024).

The social identity theory examines the connection between an individual and others in groups concerning the development of an individual's self-concept, resulting in how individuals perceive themselves. However, a person may discard any social identity connected to a group they do not identify with or wish to be associated with. Harris (2020), in a study on the decline in religious organizations, found that the social identity theory suggests that individuals can have as many social identities as the number of social groups they feel they belong to. Stets and Burke (2000) argued that social identity theory defines a person's understanding of belonging to a social category. According to Haslam et al. (2022), personal identity includes a sense of 'I' and 'me,' distinguishing an individual from others. Through social identity, the self is viewed as 'we' and 'us,' creating psychological connections to other group members. The conception of self is evaluated through shared characteristics with members of a self-inclusive social category, recognized as social identity through social categorization. Social categories can arise from fundamental demographic groupings, such as age and gender, as well as organizational affiliations like teams, religion, or employment. In this context, the traits of these categories partially shape an individual's social identity (see Figure 5).

The American Society for Pain Management Nursing (ASPMN) is another nursing organization that used a qualitative descriptive approach to guide the study design. Bazinski and Wilson (2023) used this research methodology to describe the participants' beliefs, attitudes, feelings, and details about their experience with joining professional nursing organizations. COREQ, a 32-item checklist for interviews and focus groups, served as a framework for the qualitative design. Organizations continue to face challenges in recruiting and retaining members. Although there were no significant incentives, the focus groups and individual

Figure 5

Social Identity Theory Model



interviews reinforced knowledge about ASPMN member benefits. They offered a proposal to discuss how the organization can grow while addressing member needs. The findings of this study could benefit ASPMN and other organizations by providing insights into what attracts and retains new members, creating a platform for engaging with members, and, ideally, identifying new ways to adopt engagement and initiatives.

Requa (2023) conducted a qualitative case study on how a Canadian nonprofit organization's failure to attract new military pensioners and retain them adversely impacted its

ability to influence governmental policies regarding pensioners' benefits and rights. A qualitative method explored membership acquisition and retention strategies that nonprofit organization leaders could employ. Leaders should offer clear direction and guidance to their team while adhering to consistent standards and protocols.

A single-case study design was explored using semi-structured interviews via Microsoft Teams and a document review of four nonprofit board members' membership recruitment and retention strategies to facilitate their advocacy efforts. The researchers gathered open-ended survey data from participants (Loseke, 2012). The results helped the board of directors identify three strategic advantages and four strategic challenges for the recruitment and influence of governmental policies (Requa, 2023).

A needs assessment was used to improve patients' cultural, religious, and spiritual (CRS) needs approaching their end of life. Gunawardena et al. (2024) conducted a study to evaluate the current service and barriers using an online staff survey and four focus groups. The results were analyzed using qualitative content analysis and descriptive statistics. The outcome of CRS needs to be increased from 43% to 57% in patients receiving end-of-life care in the hospital.

Black et al. (2023) developed a customized concussion education program for athletes using a realistic needs assessment approach to design a survey with 91 university representatives and athletes. At the same time, NARFE has webinars that provide educational tools and programs for members to participate in and conduct grassroots advocacy. The surveys assessed previous athlete concussion education, arrived at recommendations for concussion topics, and generated interest in implementing new courses and the implementation of the Concussion Awareness Training Tool for athletes.

A qualitative methodology was appropriate for this research on how public education unions upheld and increased their membership mass to meet the conditions of Florida House Bill

7055. Vinson (2021) utilized a constructivist paradigm in his study, which is founded on the social construction of reality. The premise of constructivism rests on the idea that truth depends on an individual's perspective. This approach allows participants to share their stories, enabling the researcher to capture their perceptions.

In the Gruen case study, Gruen et al. (2000) found that the members' participation was more enjoyable when members were offered opportunities that presented activities with which they could interact. Using relational exchange theory as a guide, Gruen et al. (2000) stated that factors such as membership length, donations, and involvement in related interest groups or associations reduce the likelihood of lapsing or not renewing memberships, such as those for museums. For NARFE, Gruen et al. (2000) are correct, whereby participation is essential, and members who participate are the individuals who remain longer in the organization. Social exchange theory contributes to a better understanding of the mental engagement between members and the NARFE organization (Ali, 2022).

The National Association of Life Underwriters (NALU) is a federation of more than 900 local chapters with a local membership of more than 100,000 life insurance sales agents. This was an academic study surrounding the management of memberships. The context for the test of the theoretical model was done by collecting data from a membership survey. The survey focused on questions related to commitment to their chapter, retention, and participation. The findings indicated a growing trend toward short-term membership, with individuals demonstrating marginal interest in the association being more likely to discontinue their membership over time (Gruen et al., 2000).

A qualitative needs assessment method best suited this study's problem and purpose approach. A qualitative study explored attendance and membership decline from the perspective of new, current, and former members (Harris, 2021). The study explored and extracted valuable

insights from participants' open-ended responses to a survey (Black et al., 2023). Participants were encouraged to express their thoughts in their own words, and their responses were expected to be honest and reflect their viewpoints (Oplatka, 2021). The outcomes could have provided a fertile consideration of the underlying influences that guided non-renewal decisions among current and former members (Creswell & Creswell, 2018).

Research Design Literature

For this research design, the intention was to use applied research designed to identify solutions to the specific issue(s) or find answers to particular questions. Applied research offers knowledge that is applicable and implementable. According to James and Slater (2014), applied research is when a remedy points to improving an existing situation and must be described as potential in the problem statement. This research presented a qualitative analysis supporting documentation of the problem and methodology that has helped the organization avoid declining membership and revenue reduction problems for continuing NARFE's mission. James and Slater (2014) suggest in Chapter 4, *Writing Your Dissertation or Thesis Faster*, that the research design should use the most appropriate design, measurement, and data analysis method to consider steps in building a reasonable development towards methodology. In this case, the research design appropriate for this study for NARFE was a Needs Assessment, which aimed to fulfill unsatisfied needs, such as increasing and improving declining membership (Chen, 2005). Balci (2022) claimed that a needs assessment is a method that endeavors to estimate deficiencies. Roger Kaufman (1993), an American figure in educational technology and performance improvement, developed this model for determining needs, which is defined as a gap in results. In this current study, an exploratory, qualitative needs assessment design was used for data analysis to identify and interpret relationship patterns in the data to explain a phenomenon (Grossman et al., 2022). Surveys are regularly employed in needs assessment to gather

information about gaps (needs) in current and desired conditions (Altschuld et al., 2022). This qualitative methodology enhances the data by offering each participant a unique perspective on the online survey questions asked, as declared by Castrodad (2023).

Qualitative researchers often build enduring professional and personal relationships through collaborative and creative processes. These strong connections can pave the way for future projects. Jordan (2018) further described the qualitative researcher as someone who integrates the scientific aspects of research and values the insights gained from humanistic, artistic, and interdisciplinary contributions. This study employed a qualitative research method to gain insights into participants' perspectives. Equally important, this qualitative needs assessment method addressed a social problem by understanding participants' opinions, perceptions, and feelings or reviewing documents. When actual needs are identified, the assessment could determine if the needs are vital, and an intervention can be done (Chen, 2005). In retrospect, Bloomberg and Volpe (2019) also stressed that qualitative research is suitable for a reflective understanding of a social situation or encounter "as viewed from the perspective of the research participants" (p. 185). The specific needs assessment research design was best suited to this approach, which focused on membership decline in NARFE from the perspective of leaders, new members, current members, and former members (Harris, 2021). This needs assessment design focused on the problem and the need to identify deficits between the current organizational state and the desired state and provide recommendations regarding how to address the gap between the present and desired conditions. There was a need to understand the internal programs that produce incentives to increase membership and revenue (such as offering informative webinars at the application fee amount) and an external investigation on maintaining membership.

Effective organizational leadership often requires attentiveness to stakeholder needs and a proactive approach to addressing them. There was also a keen understanding of the members'

needs and actions taken to address those needs (Stoeffler & Creedon, 2020). The needs assessment findings revealed a lack of activity and community collaboration, accessible revenue, community trust, and participation in shaping NARFE's advocacy efforts. The needs assessment results came from the survey responses, along with the researcher's recommendations, including the final report. The findings helped the NARFE organization assess the feasibility of expanding its program services.

Bachanicha et al. (2025) conducted a needs assessment study to explore the training requirements by evaluating the beneficiaries' needs for the activities of the University of Cebu LM Campus College of Hospitality and Tourism Management's community extension services. A training needs assessment compares an individual's competencies to the established standards. This study utilized a self-assembled survey. The respondents' evaluations generated interesting results that can be translated into practical applications for new policy recommendations.

Conclusions

The significance of new research on this topic of study is imperative to most organizations in withstanding their position of decline and lack of recruitment (Cronin et al., 2008). The literature review was conducted to provide a conceptual framework as the basis of this study's analysis and a clearer view with which to interpret its findings (Ridley, 2012). Discussions were presented to reflect the conclusions derived from the literature analysis. Comparisons of different organizations revealed similarities between those results and the findings related to each association. Generational differences were presented to describe the differences among age groups and the changes in behaviors, attitudes, and lifestyles for different periods. There are differences in the direction and degree of membership an organization could take based on its mission and structure. The literature research provided supporting evidence for

this study on a realistic problem that this research addressed, thereby underlining its significance (Walton, 2017).

Chapter Summary

Chapter 2 provided the key points to describe related research in the field and demonstrated how this work extends or challenges future research (Ridley, 2012). The Chapter covered the historical and current content related to the study and synthesized the sources by contrasting the various perspectives. This literature research presented influencing factors or weaknesses that led members to leave the association and identified the organization's strengths that had influenced a member's decision to stay (Fowler et al., 2020).

Chapter 2 then discussed reasons for joining, membership satisfaction, and retaining one's membership, as well as generational differences. These discussions included insights into conceptual framework literature, methodology literature, and research design literature. This study's significance lies in addressing the issues of declining membership, which remain unresolved (Fowler et al., 2020; Harris, 2021). Chapter 3 focuses on and described this study's research methodology in more detail. A qualitative method was best suited and aligned with the purpose statement. This chapter centers around and requires a researcher to collect specified information from a selection of data collection procedures that arrives with responses from a questionnaire.

Chapter 3

Research Methodology

This qualitative needs assessment study was designed to explore why the National Active and Retired Federal Employees Association (NARFE) has a declining membership. The declining result is that NARFE's lobbying efforts on behalf of federal employees and retirees are less effective. This study aimed to better understand why many members had declined NARFE memberships. The results may significantly affect their ability to influence lobbying efforts (Gover, 2022). Chapter 3 supports the research methodology and design. A qualitative method provided supporting documentation of the purpose, problem, and methodology helped the organization avoid the organization from the declining membership of NARFE. A qualitative method was best suited and aligned with the purpose statement. Given the population and sample, a survey provided responses to support and reverse the weaknesses and decline of the problem. Chapter 3 begins with the method and design of appropriateness, including population and sampling approach, informed consent and confidentiality, instrumentation (what is used to collect primary data), field test study, credibility, and transferability, followed by a data collection approach and analysis.

Research Method and Design Appropriateness

A qualitative method was best suited to the purpose statement as it provided responses that supported and reversed the problem's weaknesses and decline. Quantitative and Mixed methods were considered but were not appropriate for this case. A quantitative research method would not be appropriate for this research study because quantitative research uses a hypothesis and is all about numbers, testing hypotheses and theories, using large samples, collecting data, and then doing statistical analysis (Chalmers & Cowdell, 2021). The mixed method is a combination of qualitative and quantitative methods, and again, it was unsuitable for this case, as

it needs data related to participant perceptions (Creswell & Creswell, 2018). There are several qualitative designs, such as case study, narrative, needs assessment, and ethnography.

Ethnography, which involves a systematic study of culture, requires permission to study sites (Wilcox, 2008). This would be by undertaking “participant observations, interviews, artifacts, and documents of a culture-sharing group” with values, beliefs, and assumptions, then producing a narrative account of that culture (Hesse-Biber et al., 2019, p. 239). A case study is a qualitative design that explores a program, process, or one or more individuals. The case requires a researcher to collect specified information from a selection of data collection procedures over a phase of time (Yin, 2018). In this current study, an exploratory, qualitative needs assessment design was used for data analysis to identify and interpret relationship patterns in the data to explain a phenomenon (Grossman et al., 2022).

There was uncertainty among members about the full awareness of the federal community of the NARFE organization and any outcome that would drive them not to be a member (Straw et al., 2013). There is the generalizability that the findings may have provided a fruitful understanding of the underlying forces that drove non-renewal decisions among current and former members (Creswell & Creswell, 2018). Having members renew their membership is contingent on satisfaction with the particular service features, such as the value the organization and brand image represent (Capponi et al., 2021).

The qualitative needs assessment method addressed a social problem by understanding participants’ opinions, perceptions, and feelings or by reviewing documents. According to Bloomberg and Volpe (2019), qualitative research was suitable for a reflective understanding of a social situation or encounter as perceived from the perspective of the research participants. The specific research design, a needs assessment research design, was most suitable for using the approach. The research assessment design aligned with the problem by addressing the

challenging issue of declining membership within the organization and aimed to improve and increase membership to enhance the organization's financial status. Needs assessment is a method that endeavors to estimate deficiencies, as described by Balci (2022).

Research Questions

To better understand and address the challenges faced by the National Active and Retired Federal Employees Association (NARFE) regarding membership retention and growth, four key research questions have been developed. These questions aimed to explore strategies for reversing the decline in membership, enhancing renewal rates, attracting new members, and fostering long-term engagement within the organization. The research will focus on identifying actionable solutions that align with the needs and expectations of both current and prospective members. The central research questions guiding this study are as follows:

- R1. How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?
- R2. What can NARFE do to influence members to renew their membership?
- R3. How can NARFE attract new members?
- R4. How can NARFE encourage members to remain in the organization?

By addressing these questions, the study seeks to provide data-driven recommendations that will support NARFE in strengthening its membership base and ensuring long-term sustainability. Creswell and Creswell (2018) described qualitative research questions to investigate the affiliations among variables that the researcher pursues to realize. The data from this method formed the research results of the study to explain, understand, and discover the problems of who, what, how, and why. The potential benefits of this research may have been an increasingly significant influence on NARFE's advocacy efforts.

Population and Sample

The population for this qualitative needs assessment study comprised participants selected from the rolls of the former membership lists and the current renewal list from the NARFE membership department population of over 130,000 members residing throughout the United States. For reliable response data, a random sample size of 50 participants was selected from the rolls of the former membership lists, and fifty participants from the current renewal list from the NARFE membership department population of 130,000 members. The selected sample population was expected to have reflected the entire population's accurate picture (Ebo, 2019).

The 50 participants were former members, and the other 50 were current renewal members. Because of threats to the completion of recruitment, retention, and outcome measurement, several members may have been unconsciously recruited who could not have provided the study with the data required to respond to the research questions (Oplatka, 2021). Selecting the appropriate design of open-ended research questions required a possible experimental group to test for a straightforward qualitative method, as presented by Presser et al. (2004). To build trust between the researcher and the interviewee, clarification was expressed to help them understand their rights as the person being studied. Since all obtained data falls into four basic categories, “observations, interviews, documents, and audiovisual materials,” the participant was advised of the circumstances surrounding the questions presented in the survey in accessing data (Jacob & Furgerson, 2012, p. 1). Current and former members were surveyed to assist in identifying critical factors within the organization affecting their choice to stay or leave the organization. This approach was conducted by the researcher through “participant observations, interviews, artifacts, and documents of a culture-sharing group” to analyze its values, beliefs, and assumptions, ultimately producing a narrative account of that culture (Hesse-Biber et al., 2019, p. 239). The researcher felt that the questions could have indicated the

behavior and attitudes, which could have influenced NARFE's changes and improved programs that fill the members' needs. Another outcome could be if the value of intangible assets, articulated by Kaplan and Norton (2004) as Human Capital, Information Capital, and Organization Capital, is aligned with those assets of the organization's strategy.

Informed Consent and Confidentiality

A consent-informed letter was composed and sent to recipients with a written request for their approved participation in a survey. The selection of former members was derived from the NARFE membership department from those residing throughout the United States. Since human subjects are involved in obtaining data by the researcher, the researcher must require approval from the Institutional Review Board (IRB) (see Appendix G). The IRB's paramount purpose is to protect human subjects' rights and welfare, as Herr and Anderson (2014) stated. It must be noted that information from the participants needs to be protected to maintain confidentiality and to align with the Belmont protocol (Belmont Report, 1979). As expressed in the Belmont Report (1979), there was a need to respect participants' rights and interests in qualitative research. Respect for persons features two critical ethical principles. One is that people should be considered independent agents with particular viewpoints about personal aspirations and act upon them under the direction of such purposefulness. Furthermore, persons with weakened independence are allowed protection because they may lack maturity and require protection while weakened. All individuals must be respected when doing research voluntarily and with sufficient knowledge. Ethics also binds researchers to protect human subjects from harm (Burr & Gibson, 2018). Participants were to complete a consent form if they were willing to participate. A consent form allowed capable adults to participate in research voluntarily (or withdraw from research). The Institutional Review Board (IRB, n.d.) ensures that the project reflects the important ethical principles from the Belmont Report: respect for persons, beneficence, and

justice. Permissions were required from the Director of Membership Engagement, NARFE organization, to collect these data (see Appendix E). Collaboration and approval with the organization on what data were necessary to request for the research study was required. Permission to acquire participants' information from NARFE for use in having participants approve participation in a survey was obtained from NARFE (see Appendix F). Participant identifiers were kept confidential by coding the participants' personal information with alphas and numbers; information was protected from outside sources and later destroyed after the analysis.

Instrumentation

The survey served as a key tool for gathering qualitative insights from participants. The role of the researcher is to examine, identify, and derive valuable open-ended answers to a survey from participants (Loseke, 2012). The researcher also worked from an emic position, drawing on the knowledge of issues and problems in identifying research questions (Salmons, 2016). The instrument was an original survey established as an element of the research. When approached, a participant readily consents or declines voluntary inclusion based on the options and choices in front of them (Herr & Anderson, 2005).

The survey was crucial in uncovering the factors influencing membership retention and non-renewal. The survey results provided a fruitful understanding of the underlying forces that drove non-renewal decisions among current and former members (Creswell & Creswell, 2018). The study examined and derived valuable open-ended answers to a survey and understood attendance and membership decline from the participant's point of view (Harris, 2021). The data were developed using an online survey to Survey Monkey (e.g., one from prior members who have ceased to continue as members and one from those who have been loyal members), with

participant comments from both dropped members and current members. Additional information was collected to accommodate questions about each participant's status (see Appendix C and D).

Table 4

Instrument - Questions Directed at Former Members

Question Number	Survey Questions
1	What are your top reasons for not continuing your membership with NARFE? Please elaborate.
2	What reasons or experiences do you feel NARFE did not offer or meet your needs?
3	How can NARFE motivate you to renew your membership?
4	What NARFE benefits do you value enough to renew your membership?
5	What benefits do you feel NARFE can offer to retain you as a member?
6	Explain how important NARFE's advocacy department is to you, which works to represent, preserve, and protect your benefits or education, which makes you more informed about the benefits you will receive.
7	Based on your response to question 1, what would be your top reasons for renewing your membership?
8	Are there any other comments you would like to make?

Interview Guide

When selecting the appropriate design for open-ended research questions, it was necessary to identify a possible experimental group to test for a straightforward qualitative method, as presented by Presser et al. (2004). A narrow research focus simplifies a practical

study, so the number of research questions should be limited to eight (see Tables 4 and 5). Both Tables 4 and 5 have interview questions aligned with and answer the research questions.

Table 5

Instrument - Questions Directed at Current Members.

Question Number	Survey Questions
1	What benefit do you feel NARFE offers to attract prospective members?
2	What benefits do you feel NARFE offers to retain you and current members?
3	Explain how important you feel that NARFE's advocacy department represents, preserves, and protects your benefits.
4	Explain any communication with the Federal Benefits Institute, which answers questions on Social Security, TSP, Annuity benefits, Health Insurance, and other issues.
5	How have you benefited from using FEDhub, NARFE Magazine, NARFE perks, and the NARFE website?
6	How have you contacted your legislative representative through advocacy action alerts or other methods, which enhances NARFE's position on Federal issues?
7	What other reasons have kept you as a dedicated member?
8	Are there any other comments you want to make?

Note. The above questions from a survey help answer the research question, “How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?” This research question aligns with the above open-ended survey questions. The

researcher assumed participants answered the survey truthfully and cooperatively without the intention of falsely endangering the study or the NARFE Organization.

Field Test

Qualitative studies require a field test of at least three participants on original narrative data collection instruments (see Appendix H and I). For a review of the questions in Appendix H, for the former member list, three candidates were the NARFE director of Membership and Engagement and two prior course instructors. The instruments had been adjusted, improving the questions to accommodate the data inducted (Jacob & Furgerson, 2012). The questions asked generated data for the identification of study results. Five peers and colleagues were involved in a review of the questions in Appendix I for feedback and input concerning a proposed research instrument of current members.

Field tests must be conducted before the IRB approves the proposal. Field tests are a direction to generate new knowledge and a deeper understanding of the topic of study (Salmons, 2016). In addition, the field test upheld the data collection instruments to collect the planned information in alignment with the research questions (Church et al., 2002). A narrow research focus simplified a practical study, so the number of research questions was limited to four. Field tests involved feedback and input concerning a proposed research instrument and did not require IRB approval as they did not involve collecting data (Bloomberg & Volpe, 2019).

Credibility and Transferability

In qualitative research, transferability refers to the extent to which the findings of a study can be applied to other contexts, settings, or similar situations. It was with the expectation that sufficiently detailed descriptions of data in context were reported with sufficient detail and precision to allow judgments about transferability. This researcher's role was to provide detailed descriptions of the study and to decide if the findings applied to their own context. The

researcher reasoned that executing an inquiry's findings was beyond the decisions about the operation of that time frame, and time would not change the context (Erlandson et al., 1993). In addition, "there can be no transferability if credibility is lacking" (Erlandson et al., 1993, p. 34).

Credibility is crucial to research validity, ensuring that the findings accurately represent participants' perspectives and experiences. In this study, credibility was related to the degree of confidence in the truth of the findings (Erlandson et al., 1993). If the knowledge from all participants is honest and reflects one's personal view, a research study becomes valid (Oplatka, 2021). Credibility must be ascertained with the participants to build trust between the researcher and the interviewee. Data falls into four basic categories: observations, interviews, documents, and audiovisual materials. Therefore, the participants were advised of the circumstances surrounding the questions presented in the survey and interview to access data and gain credibility for their responses (Jacob & Furgerson, 2012). The researcher's role and approach were to carefully question the participants for truthful and cooperative answers to the study. According to Erlandson et al. (1993), trustworthiness can concern the study user who will use the research for consideration and activeness.

Data Collection

A survey of questions was distributed through Survey Monkey to gather data from participants. After collecting the responses, the data were identified and analyzed based on the findings that had been developed to create essential changes to the current processes (Grossman et al., 2022). As a researcher, it was incumbent to be cautious of any pitfalls during data collection or risks to completing recruitment, retention, and outcome measurement (Oplatka, 2021). Looking at future research recommendations in past case dissertations could be a good focus point for voiding or neglecting the research results (Creswell & Creswell, 2018). This study could further uncover proposals for solutions and the alleviation of the problem. The

results from the questions could indicate behavior and attitudes, which could then influence NARFE's changes and improve upon programs that fill the members' needs. The data collection and analysis results should be deemed acceptable, unfailing affirmation of the study's purposes, as attested by Price (2016).

This qualitative needs assessment study population was comprised of 50 participants who were selected from the rolls of the former membership lists and 50 from the renewed list from the NARFE membership department population of 130,000 members residing throughout the United States. It was necessary to collaborate and get approval from the organization on what data would be necessary to request for the research study. The 50 participants were selected from the rolls of the former membership lists and the renewed list from the NARFE membership department population to have reliable response data. A recruitment letter was sent to current and former members, linking them to Survey Monkey. An Informed Consent Form letter requesting their approval to participate in a survey (see Appendix C and D). Collaboration and approval were given to the organization regarding what data would be necessary to request for the research study (see Appendix E and F).

Fifty participants were dropped members, and fifty consisted of current members. Because of threats to the completion of recruitment, retention, and outcome measurement, several members may have been unconsciously recruited who could not provide the study with the data required to respond to the research questions (Oplatka, 2021). Selecting the appropriate design of open-ended research questions required a possible experimental group to test for a straightforward qualitative method, as presented by Presser et al. (2004). To build trust between the researcher and the interviewee, clarification was expressed to help them understand their rights as the person being studied. Since all obtained data falls into four basic categories, "observations, interviews, documents, and audiovisual materials," the participant was advised of

the circumstances surrounding the questions presented in the survey in accessing data (Jacob & Furgerson, 2012, p. 1). Former members were given a survey to identify critical factors affecting their choice to stay or leave the organization. The results from the questions could have indicated the behavior and the attitudes, which then could have influenced NARFE's changes and improved upon programs that fill the members' needs. Another outcome could be if the value of intangible assets, articulated by Kaplan and Norton (2004) as Human Capital, Information Capital, and Organization Capital, is aligned with those assets of the organization's strategy.

Data were collected via the administration of an online survey. Online surveys offered the researcher an inexpensive, quick, and convenient way to collect data (Hunter, 2012; Walton, 2017). Online surveys are simple and can be administered via links to the targeted population via e-mail or social media networks, such as the organization's website and Facebook (Walton, 2017). The data network was the NARFE FEDhub, a community network that all members can access or be accessed. Triangulated information might have been collected from different points of view within the context of a study. The collected data could have yielded convergent ideas. Again, data accumulated from literature research, which was documented from other organizations, and an online survey allowed the researcher to triangulate data on the experiences of former and current members to share with the NARFE organization, possibly revitalizing the recruiting efforts for growth and maintaining membership in reducing the decline.

Data Analysis

This qualitative needs assessment study explored why the National Active and Retired Federal Employees Association (NARFE), a single organization, had a decline in membership. A needs assessment was used to identify discrepancies between the existing organizational state and the preferred state and offer recommendations concerning how to address the gap between the existing and preferred states. First, issues related to the purposeful development of a content

analysis framework that identifies patterns and manages or best achieves the research objectives were discussed (Gerbic & Stacey, 2005). A survey was used to collect data, identify and analyze patterns in the data, explain a phenomenon, and develop results to develop essential changes to the current processes (Grossman et al., 2022). The final consideration was using qualitative needs assessment along with Dedoose software with an AI solution that helped organize, annotate, search, display, and analyze qualitative data, as James and Slater (2014) suggested. Dedoose software was used, where data were stored, organized, and analyzed, which then identified common themes among the data. As a researcher, it was incumbent to be cautious of any pitfalls during data collection or risks to completing recruitment, retention, and outcome measurement (Oplatka, 2021).

Again, once the data were collected and accumulated, the research project took on an analytical stage of scrutiny. When comparing and contrasting the qualitative textual data analysis, the question is, “What things, ideas, or factors make for similarity or difference among those participants who responded?” (Hesse-Biber et al., 2019, p. 284). From the data, the analysis consisted of an interpretation based on “hunches, insights, and intuition” (Hesse-Biber et al., 2019, p. 503). For interpretation, the researcher, as an interpretivist who takes a central role in the interpretation, had to understand the different levels of meaning-making that the participant establishes the meaning of the occurrence. The use of open coding for each research question provided pieces of data that summarize what is seen happening. The researcher made the meaning from personal experience and knowledge (Hesse-Biber et al., 2019; Thomas, 2023). Narrative data needs to be analyzed individually for each research question. Chalmers and Cowdell (2021) claimed that three elements analyze the data of the narrative: “interaction (personal and social), continuity (past, present, and future), and situation (physical places or the storyteller’s places)” (p. 508). Chalmers and Cowdell (2021) stipulated that a set of facts or ideas

analyzes data conveyed using specific, laborious techniques and presented it in a way that best addresses the research question. The researcher thoroughly examined the data for similarities and differences. Comparing each answer against the others regarding their similarities and differences also provided new themes. The data analysis process was open to the researcher's subjective interpretation and focused on maintaining impartiality.

Ensuring transparency and reflexivity in the analytical process helps maintain the integrity and credibility of the research findings. For a researcher, there are ethical considerations for data analysis, and ethical issues had to be a concern as it relates to participant protection from harm and disclosure of identifiable information from the participant in the outcome of the data as the analysis is processed (Hesse-Biber et al., 2010). Finally, in making sense of the qualitative research, the researcher constructed the interpretation of the data and themes in narrative research analysis.

Chapter Summary

Chapter 3 outlined the research methodology and design, detailing the processes and considerations that guide the study's approach. In addition, Chapter 3 included the key points related to research in the field and showed how this work extends or challenges future research (Ridley, 2012). The chapter also covered the qualitative research method and design appropriateness, where a needs assessment research design had gained data from questions that form the research results of the study to explain, understand, and discover the problems of who, what, how, and why. Following came the discussion of the population and sampling approach, informed consent and confidentiality, instrumentation, credibility and transferability, followed by a data collection approach, and how survey results developed data analysis. Chapter 4 focuses on data analysis and results and will comprise and solely describe the analysis process and the study results without citations.

Chapter 4

Analysis and Results

The purpose of this qualitative needs assessment study was to explore why the National Active and Retired Federal Employees Association (NARFE) had a decline in membership. This decline reduced NARFE's effectiveness in lobbying for federal employees and retirees, resulting in lost revenue and decreased efficacy. This study aimed to understand the reasons behind the decline in NARFE memberships, as a substantial decrease in enrollment may adversely impact the organization's ability to influence lobbying efforts. This chapter restated the research questions and described the data collection and analysis processes in detail, along with the demographic characteristics of some participants. The chapter concluded with a clear presentation of the results and themes identified from the survey data collected from current and former members, followed by a summary of key findings.

Research Questions

The following four central research questions are addressed by exploring participants' beliefs, preferences, and experiences based on responses to two open-ended surveys. One survey was conducted for current members, and the other was conducted for former members. Both surveys addressed the research questions.

R1. How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?

R2. What can NARFE do to influence members to renew their membership?

R3. How can NARFE attract new members?

R4. How can NARFE encourage members to remain in the organization?

Data Collection

Based on IRB requirements (see Appendix E, F, and G), the researcher provided a signed permission form for use. This allowed the researcher to email a recruitment document (see Appendix A) online to selected subjects requesting participation from current members through FEDhub (NARFE current member email network system). The NARFE organization, based on the data access and use permission from NARFE, sent a recruitment document (see Appendix B) to selected subjects requesting participation from former members through their internal roster system. After a subject had chosen to participate in the survey, the next step was to click on a link that would send them to Survey Monkey. An informed consent form was included in the introduction to the survey in Survey Monkey, where the participant was to answer yes or no to accept the terms of the informed consent form before advancing in the survey (see Appendix C and D). Participants were advised of the right to withdraw without repercussions before receiving access to the survey administered through SurveyMonkey. This individual survey was administered to collect data related to each participant's status and was online; the researcher received a waiver of documentation of informed consent and built it into the first page of the survey, where the participant agreed to participate. Acceptance of the terms in the consent form (see Appendix C and D) and a "yes" response to the corresponding question permitted continuation through the survey. Members' participation in this study was strictly voluntary; all information gathered in the research was confidential, and the subjects were anonymous in collecting data.

Once the data were collected and accumulated from Survey Monkey and presented to the researcher, an identification code (P1, P2, P3, etc.) was included. The participant codes were used to track participant responses and maintain anonymity throughout the study. The research project then progressed to an analytical phase, involving systematic scrutiny of the data. A

survey instrument was employed to gather data, identify and analyze emerging patterns, and generate findings that could inform potential improvements to existing processes. Once all surveys were collected, the researcher analyzed the data to identify patterns and address the research questions. A qualitative approach was used to interpret relational patterns within the data and explain the underlying phenomenon.

The qualitative survey responses provided insights into the questions of who, what, how, and why, contributing to a deeper understanding of the underlying issues. Data collection served as a critical source of evidence to support robust analysis and generate credible, dependable findings. To strengthen the validity of the results, the researcher applied data triangulation by analyzing responses from two distinct participant groups: former and current members. Upon completing data collection, the researcher analyzed the data using Dedoose, a qualitative data analysis software that integrates AI tools to organize, annotate, search, and interpret qualitative information. This process led to the identification of common themes across participant responses.

Demographics

The study participants consisted of only those who were or are federal government employees throughout the United States. There are over 2,646,979 federal retirees, according to the Federal Employees Retirement System (2022), and 4,253,133 active working employees, according to the Federal Workforce Statistics Sources (2024) throughout the workforce area determined in the United States. The researcher obtained up to 50 respondents from each survey for former and current federal members. A total of 3660 online surveys through Survey Monkey were sent to current members of NARFE through the network called FEDhub, created by NARFE. Another online survey through Survey Monkey was sent to 5100 former NARFE members who have lapsed their membership through the NARFE headquarters department of

membership engagement while acting as the interlocutor to protect the PII of lapsed (“once and future”) members. For current members, 76 usable surveys were responded to. 13 surveys had incomplete data, 5 responded No to the consent form, and 50 were selected to fulfill the amount for analysis (see Figures 6 and 7). For the former members, 59 usable surveys were responded to. 20 surveys had incomplete data, 4 responded No to the consent form, and 50 were selected to fulfill the amount for analysis.

Figure 6

Current Responses

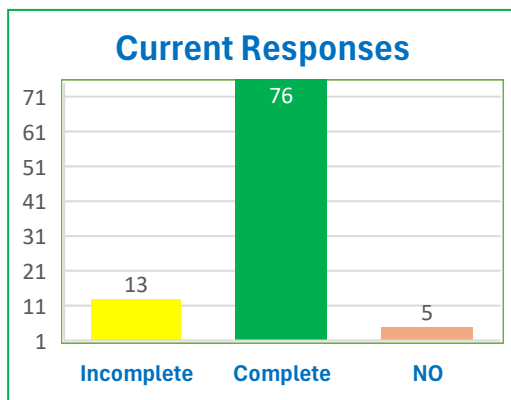
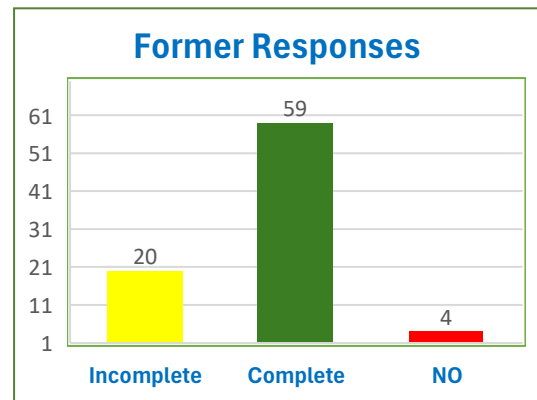


Figure 7

Former Responses



Based on past studies, it was evident that surveys are normally associated with a low return rate. Only 94 responses from current members were received, giving a return rate of 2.56%. Former members had a return rate of 1.49%. This low return rate imposes on the generalizability of findings. Since the selected sample population was very small during the period, it might not reflect the entire population's accurate picture, which lacked broad representation as the responses lacked adequate explanation through elaborative narrative (Ebo, 2019). Of the final respondents of the former members, 21 (42%) were male, 25 (50%) were female, and 4 (8%) preferred not to respond. In the current member surveys, 20 (40%) were male, 26 (52%) were female, and 4 preferred not to respond (see Figures 8 and 9). The themes do not explore how different demographics (e.g., age groups) might value NARFE differently.

However, the gender of each was generally balanced and represented equally. Younger members or newer retirees might have distinct priorities compared to older members. Younger members seek ways to stay active, whereas older members are focused on comprehensive medical coverage, assisted living, and end-of-life planning.

Figure 8

Current Member Gender

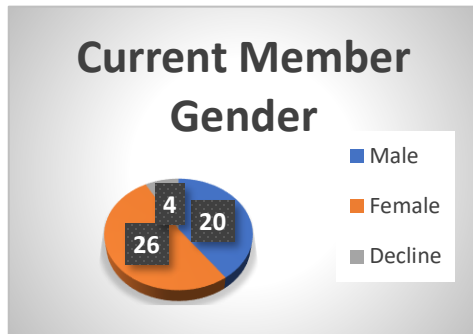
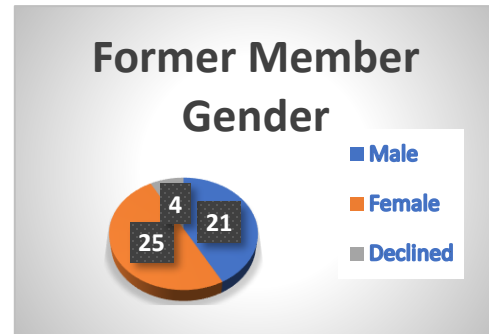


Figure 9

Former Member Gender



The age groups of the respondents in both the current and former survey were categorized by generation gaps and divided into age data of 1928-1946, 1947-1964, 1965-1980, and 1981-1996, which will indicate the generation differences among participants (Boomer, X, Y, etc.), which are the age gaps that will provide that information (see Figures 10 and 11). Notably, 82 % of former and 76 % of current members were baby boomers.

Figure 10

Former Generation

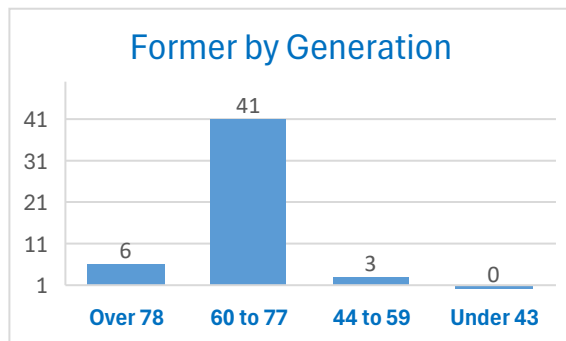
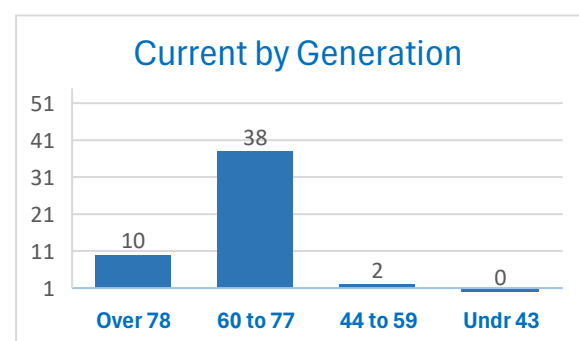


Figure 11

Current Generation



Also, how long have you been a member was asked? Participants were male and female with between one and 3 years of membership, 4 and 10 years, 11 and 20 years, and 21 to 30 years. Note that 40% of former members were 3 years or less. Of the current members, 44% were between 11 and 21 years (see Figures 12 and 13).

Figure 12

Former Years of Membership

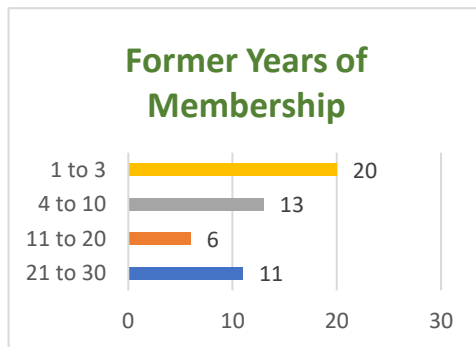
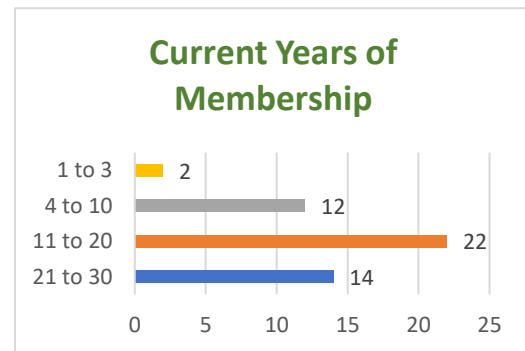


Figure 13

Current Years of Membership



Analysis of Qualitative Data

This research proposal presented a qualitative analysis supported by documentation of the problems and methodology addressing the challenges faced by the organization, mainly due to declining membership and reduced revenue. The study aimed to provide new insights into understanding the underlying causes of this decline and how they impact NARFE's ability to fulfill its mission. Ultimately, the research may contribute valuable knowledge on strategies to counteract the membership decline and ensure the organization's continued success.

The data sources collected for this study were responses to online surveys conducted with Survey Monkey. Online surveys offer the researcher an inexpensive, quick, and convenient data collection method. They are simple and were administered via email links to the targeted population. Data were collected via the administration of an online survey. Table 6 shows survey questions that are aligned with and answer the research questions. The researcher used the analytic software Dedoose to identify and classify the participants' emerging themes.

Table 6*Research Question and Survey Questions.*

Research Question	Survey Questions
R1. How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?	1. What are your top reasons for not continuing your membership with NARFE? Please elaborate! What reasons or experiences do you feel NARFE did not offer or meet your needs?
R2. What can NARFE do to influence members to renew their membership?	3. How can NARFE motivate you to renew your membership?
R3. How can NARFE attract new members?	1. What benefits do you feel NARFE offers to attract prospective members?
R4. How can NARFE encourage members to remain in the organization?	2. What benefits do you feel NARFE offers to retain you and current members? 3. Explain how important you feel NARFE's advocacy department represents, preserves, and protects your benefits.

Themes were developed through a contextual analysis of all participant responses. Keywords aligned with the survey questions were identified using a deductive reasoning approach, wherein conclusions were drawn based on general premises. The researcher ensured that participant responses were relevant and that the reasoning provided was logically valid. All data were coded and organized into subsets corresponding to the research questions, facilitating the identification of emerging themes. The themes and associated codes were further refined to reveal patterns, relationships, and underlying meanings within the dataset. Ultimately, thematic analysis provided insight into participants' perspectives and experiences. The results below present the themes developed from the findings and related to the research questions (see Table 6).

Results

Themes Found Per Former Survey Questions.

Themes that developed from the responses to the surveys sent and completed by former members resulted in three main themes. When former members were asked, "What are your top reasons for not continuing your membership?" key themes emerged. These themes reflect the factors that influenced their decision to discontinue membership and provide insight into areas that may require attention for future retention efforts.

Theme 1: Lack of Tangible Benefit. This theme directly relates to research questions R1 (reducing declining membership) and R3 (attracting new members). The absence of perceived value in membership offerings is a core driver of declining membership and a barrier to attracting new members. Many members (especially retirees) found the materials (e.g., magazine articles and lobbying efforts) irrelevant to their needs. The organization's perceived focus on active employees alienates some retired members. Other members believed they could access equivalent information through sources like AARP or unions. Many members responded that the

benefits offered were irrelevant, insufficient, or unclear. Some respondents, 20%, felt that NARFE did not provide enough benefits or services to justify the membership cost. Some stated their reason but did not elaborate or give more information. The impact may be a gap in either the delivery of meaningful benefits or the communication of these benefits to members. If members do not see a benefit or value in being a member, how can NARFE attract new members?

P19 stated, “No benefits that meet my needs.”

P8 commented, “Don't see a tangible benefit.”

P36 remarked, “Did not see value in the membership.”

Theme 2: Cost and Financial Constraints.

High costs without perceived commensurate benefits make retaining and renewing memberships difficult. Cost is the most frequently cited reason for not renewing membership, especially among fixed-income retirees. Members struggle to justify the annual fees given the perceived lack of tangible benefits. Most members, 30%, who resolved not to renew their membership stated that they did so because of the cost, financial priorities, or limited perceived benefits. The impact suggests that pricing strategies or the perceived value of membership relative to cost could be a significant barrier.

P29 noted, “Cost of membership is too high.”

P13 remarked, “Financial. On a limited budget. This is not a priority.”

P22 observed. “Increased annual costs without increased benefits.”

Theme 3: Political and Advocacy Misalignment.

Misalignment with political stances may alienate members and contribute to dissatisfaction. Some members, 12%, felt the organization’s advocacy aligns too closely with specific political ideologies. Some issues do not match members' priorities, which creates

dissatisfaction. Some comments were vague and were not elaborated on to find the meaning behind the dissatisfaction. Some members who did not renew their membership felt that advocacy was important and has been a huge asset when it comes to representing and fighting for federal employee rights and benefits. Others felt the advocacy efforts lack visible results or impact.

P44 noted, “Don’t agree with its lobbying positions.”

P38 commented, “L I B E R A L. Promoting and backing legislature I do not agree with. They seem to just be an extension of the union. No one wants to take responsibility.”

P35 stated, “NARFE would not support reasonable reforms of civil service and government workers.”

P33 reported, “I see little evidence that the advocacy has impacted me as a retired federal employee.”

Other issues of worthiness that affected members' decision not to renew were being dissatisfied with local chapters, citing political bias or ineffective leadership. Subsequently, active employees felt outnumbered, and retirees felt their needs were underrepresented. In broad representation, some members noted the difficulty in addressing the diverse needs of the federal workforce. Others felt the magazine and the materials were not sufficiently engaging or tailored to their status (This is employee vs retired). One minor concern was issues with accessing local chapters (e.g., distance, unresponsiveness), and technical difficulties with the website (e.g., renewing or changing chapters) discouraged membership renewals. Health issues, family commitments, and life changes (e.g., moving) contributed to lapsed memberships. While these are beyond organizational control, better engagement may help retain these members.

As noted above, the National Active and Retired Federal Employees Association (NARFE) has faced significant challenges in retaining members. Feedback from the surveys

revealed several issues, including concerns about cost, relevance, political alignment, organizational communication, accessibility, and modernization. These factors have contributed to the decline in membership and suggest areas where NARFE could improve its approach to meeting member needs and expectations better.

Themes Found Per Current Survey Questions.

In contrast, current organization members had a different perspective on their membership. Those members that are current and continue to stay members stated positive remarks as indicated in the themes. Many references emphasized how NARFE provides members with valuable updates on federal issues, legislation, healthcare options, and retirement benefits through various channels, including the NARFE magazine, website, FEDhub, and email newsletters. Themes that developed from the responses to the surveys sent and responded to by current members resulted in four themes. When current members were asked what benefits do you feel NARFE offers, how important is advocacy, how do they use the Federal Benefits Institute, FEDhub, the magazine, and other reasons for being a member, the following themes were developed:

Theme 1: Advocacy and Representation.

Advocacy is a critical reason for continued membership, suggesting it is a unique selling point for NARFE. Members value NARFE's legislative efforts to protect federal benefits and the organization's role as a political voice in Congress. Clear communication about NARFE's activities, achievements, and advocacy efforts fosters trust and loyalty. Members highly value NARFE's lobbying efforts to protect and enhance federal employee and retiree benefits, including working on issues like eliminating WEP/GPO penalties.

P91 commented, “Opportunities to have an avenue to communicate with like-minded federal workers toward the status of, and preservation of, earned benefits, in an environment that evokes a shared initiative to take actions to do the same.”

P25 mentioned, “Advocacy for NARFE member benefits and related legislation; informational webinars; a monthly magazine with informative articles; an online member forum; and points of contact for assistance.”

P65 responded, “A political voice for Federal and retired Federal employees. Discounts. Informative articles in the magazine. An opportunity to meet with local members and connect with them.”

Theme 2: Community and Networking.

Social connections and shared interests play a significant role in member satisfaction and retention. Many members expressed appreciation for resources such as the magazine, FEDhub, the Federal Benefits Institute, Perks, and the NARFE website. However, some members had not utilized these resources, and their feedback provides insights into potential areas for improvement and greater engagement.

Magazine: This was the most appealing membership source to all.

P65 articulated, “The NARFE magazine has informative, entertaining, and useful articles. I enjoy the COLA countdown. I enjoy the health and science articles the most.”

P94 shared, “The NARFE magazine is a monthly reminder that NARFE works for all of us, all the time. Each month, at least one article catches my eye, and I learn what I need to know even before I know that I need it!”

P91 conveyed, “Retiring in 2012, the magazine was instrumental in maintaining my membership in NARFE, which I had joined in 1999.”

P14 affirmed, "The monthly magazine keeps me up-to-date and was extremely useful in planning for retirement as a federal employee. Now that I am retired, I continue to appreciate the relevant and timely information."

FEDhub: Many stated they did not understand or use it, and others did.

P94 declared, "FEDHub is a powerful addition to the NARFE community—it allows us to talk to one another and hear what's happening throughout the organization. WOW—what an asset this is!"

P92 stated, "Very valuable being in contact with others and getting questions answered."

Website: Responses are from those who have or use the internet.

P43 described, "NARFE Website is informative and keeps me up to date with issues."

P48 shared, "The NARFE website is excellent to enable us to advocate for our benefits."

P59 conveyed, "Website is useful but very poor and hard to find items."

P94 highlighted, "About the NARFE website - it needs to be better organized! And the search system is almost useless. This is the weakest link right now, and yet it is so vitally important."

Perks: Many stated that they rarely use them or not at all.

P6 commented, "I have used the NARFE perks discounts with several vendors."

P44 articulated, "I've explored NARFE Perks and found I can do better with my other "perks," i.e., credit card, group affinity, and veterans discounts."

P52 shared, "NARFE perks. I have used three or four of them and am very satisfied with each one."

Theme 3: Information and Education—Educational resources and updates are valued but underutilized.

The Federal Benefits Institute department provides a valuable resource to members by offering information to address issues related to federal annuities, Social Security benefits, health insurance, and other retirement concerns. Webinars are frequently offered to educate members on these important topics. These resources help ensure members are well-informed and can navigate their retirement benefits effectively.

Federal Benefits Institute: This was the least used source for information.

P55 expressed, “The Institute has professional and knowledgeable people to answer any question that a federal employee may have.”

P4 asserted, “I’ve contacted them about my annuity amount & COLAs.”

P94 mentioned, “I have directly benefited from the webinars and research they conduct.”

P80 commented, “My communication was dismal. I called and left a voice message two or three times and never received a return call. I was very disappointed and hesitated to renew my membership due to this.”

P84 reported, “I have not had any interaction with the Federal Benefits Institute.”

Theme 4: Social Involvement to Stay a Member - Social interaction and organizational culture contribute to members' emotional investment.

P80 remarked, “Local chapter connections with fellow members.”

P81 shared, “I also loved the social aspect, but now, due to health issues, I can no longer participate. I do miss my friends.”

P73 declared, “Meetings. It’s always good to see fellow members and listen to speakers.”

P68 stated, “I am a part of a social group of former federal employees who share my interest in protecting our earned retirement benefits.”

P81 commented, “Great organization in my day but it is now changing. Cell phones and computers have taken over. The social aspect is disappearing.”

Further Comments Were Asked

In addition to the themes above, both surveys included one last question asking if respondents had any comments to make. 18 respondents did not have a comment. Some that did are noted below.

P94 expressed, “Participating in NARFE is one way to stay engaged and build a better country. Instrumental to this are the digital tools NARFE provides. I joined by going to a meeting in person, but now I relish the meetings held via Zoom, and the occasional annual conferences or federation and chapter events. NARFE has become a central organizing experience in my life, and I have been glad to share the value of NARFE by giving gift memberships to many friends.”

P78 asserted, “There needs to be a way to get the information to the workers in the field and offices.”

P66 conveyed, “When I was a federal employee and not an annuitant, I was not aware of NARFE or the work it does on behalf of the Federal workforce. More work needs to be done to make the younger generations working in the Government more aware of NARFE and the work they are doing to protect their benefits.”

P4 noted, “I knew about Narfe from my father, but many people at the IRS are unaware. Some government agencies don't embrace unions, and some federal workers may think NARFE is a union. Overall, there is a lack of awareness about NARFE.”

Chapter Summary

This study leveraged responses from online open-ended surveys administered via SurveyMonkey to investigate membership trends within the National Active and Retired Federal

Employees Association (NARFE). Surveys were distributed to current and former members to identify motivations for maintaining or discontinuing membership. Moreover, one survey was conducted for former members to find out why there was resistance to renewing their membership. The other survey was conducted on current members to determine why they remain as members. The study participants consisted of only those who were or are federal government employees throughout the United States. Survey Monkey distributed the data collection instruments (surveys) after an invitation of the respondents and by allowing them to demonstrate their consent to participate in the study. Responses obtained were treated with the utmost confidentiality, as the names of the respondents were not indicated anywhere, and a number was their code. The data collection then provided responses that, using Dedoose, a qualitative software, developed codes for gathering themes. The themes that emerged from the survey of former members contributed to the members' perspectives and experiences. According to former participants, the most significant barrier to retention was cost (e.g., membership fee), the most frequently cited reason for not renewing membership. Other reasons were a lack of tangible benefits and political and advocacy misalignment. The themes that emerged from the survey of current members exemplified a connection to the organization through the effectiveness of how they receive advocacy representation, communication through the magazine, social involvement, and a connection to the organizational values they pertain to, as well as assistance from the Federal Benefits Institute. The themes that were presented for current members were (a) Theme 1: Advocacy and Representation, (b) Theme 2: Community and Networking, (c) Theme 3: Information and Education, and (d) Theme 4: Social Involvement to Stay a Member. The Themes found per former survey questions were: (a) Theme 1: Lack of tangible benefits, (b) Theme 2: Cost and Financial constraints, and (c) Theme 3: Political and Advocacy Misalignment. Chapter 5 further discusses the themes uncovered in the data analysis phase

completed in Chapter 4. It consists of this study's conclusions, recommendations, research questions, discussion of findings, limitations, recommendations for administering communication to gain greater acceptance of remaining a member, recommendations for future research, and the chapter summary.

Chapter 5

Conclusions and Recommendations

This qualitative needs assessment study explored why the National Active and Retired Federal Employees Association (NARFE) had a declining membership. To retain members, the national curriculum of NARFE needed to be assessed. A needs assessment design was required to address dissatisfaction with the lack of perceived value in membership offerings and the desire for change. “Needs Assessment is a diagnostic process that relies on data collection, collaboration, and negotiation to identify and understand gaps in learning and performance and to determine future actions” (Gupta et al., 2007, p. 15). This study explored and extracted valuable insights from participants' open-ended responses to a survey to refute and support the conceptual framework (Loseke, 2012). This decline reduces NARFE's effectiveness in lobbying for federal employees and retirees, resulting in lost revenue and decreased efficacy. This study aimed to understand why many previous members have declined NARFE memberships since a significant drop in enrollment can significantly affect the organization's ability to influence lobbying efforts. Chapter 5 reiterates the research questions and discussed the findings, then gave the limitations and recommendations to leaders and practitioners, recommendations for future research, and the chapter summary. The decline has resulted from numerous reasons, as has been addressed in the answers to the survey. Since the age group of the membership is mostly 70 years old and over, the primary source of decline may be due to death (Johann DeCastro, personal communication, August 15, 2024).

Research Questions

A qualitative needs assessment design was facilitated with open-ended research questions. Research questions were addressed by exploring participants' beliefs, preferences, and

experiences based on responses to two open-ended surveys. The four guiding research questions were the following:

- R1. How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?
- R2. What can NARFE do to influence members to renew their membership?
- R3. How can NARFE attract new members?
- R4. How can NARFE encourage members to remain in the organization?

Discussion of Findings

The study's findings, compared with existing literature, revealed significant intersections as well as areas warranting further investigation. Although some alignment was noted, a discernible gap emerged, as limited scholarly research addresses membership decline within organizational and association contexts, particularly those structurally or functionally similar to NARFE. Furthermore, the study found minimal literature discussing NARFE's alignment or comparison with peer organizations facing similar challenges in member participation.

The literature review identified factors or shortcomings that describe other associations, which may have also influenced NARFE members to depart from the organization. It established a conceptual framework for this study's analysis and offered a clearer perspective for interpreting its findings. The literature review highlighted existing knowledge on the study's topic, underscoring the necessity of this research project and its alignment with established insights (Jensen, 2017; Garrod, 2023). Data analyses of surveys from former members revealed the following themes.

Former Members Findings

Theme 1: Lack of Tangible Benefits

This theme directly relates to R1 (reducing declining membership) and R3 (attracting new members). Morrison and Misener (2022) found that membership growth depended on gaining members to support different growth strategies, which members were unwilling to engage in. P22 stated, “Increased annual costs without increased benefits.” The following are subheadings under Theme 1: Lack of Perceived Value, Lack of Connection, and Lack of Benefits.

1.1 *Lack of Perceived Value*

Membership organizations face significant challenges when they fail to deliver perceived value to their members. The absence of perceived value in membership offerings is a driver of declining membership and a barrier to attracting new members (Fowler et al., 2020; Harris, 2021). Members of the Tampa Club resigned because the club did not produce enough value for them to maintain their membership (Tompson et al., 2014). Individuals will drop membership when they find the organization did not produce enough value to maintain a member (Tompson et al., 2014). One NARFE participant remarked, P36, “Did not see value in the membership.” Social identification is a major foundation for participating in social activities, and the response can be understood as belonging to the organization and becoming a member (Tudor & Petre, 2021).

1.2 *Lack of Connection*

A reason for gathering is that individuals are committed to a bold, sharp purpose; otherwise, there is no connection with the group that joined (Parker, 2020). Elkins (2019) found a connection with the theory of cognitive dissonance, which implies that people find their feelings are different from their reality as they reflect on their behavior. P81 conveyed, “Great

organization in my day, but it is now changing. Cell phones and computers have taken over. The social aspect is disappearing.”

1.3 *Lack of Benefits*

In a church study, Huang et al. (2022) found that a supposed lack of membership benefits and inadequate association management were also identified as deterrents to retaining membership. Some respondents, 20%, believed that NARFE did not offer sufficient benefits or services to warrant the membership cost. P19 stated, “No benefits that meet my needs.”

Theme 2: Cost and Financial Constraints

High costs without perceived commensurate benefits make retaining and renewing memberships and personal reasons/demands hard. Thirty percent of members who chose not to renew their membership indicated that they did so due to cost, financial priorities, or limited perceived benefits. The following two sub-themes express income status. There is an example of high cost and a comment on financial burden. The following are subheadings under Theme 2:

The Fee is Expensive and Financial Restraint.

2.1. *The Fee is Expensive*

The decline in members was also due to a need to reduce personal spending on their membership expenses, as indicated in the Tampa Club (Tompson et al., 2014). From the survey, former NARFE member P13 affirmed, “Financial. On a limited budget. This is not a priority.” Cost is the most frequently cited reason for not renewing membership, especially among retirees with fixed incomes. Fowler et al. (2020) found that members, when joining an organization, are targeting a “low entry cost” (p. 219).

2.2. *Financial Restraint*

In a church study, Huang et al. (2022) found that financial and time limitations deter members from being members. For NARFE, 20% of respondents believed that NARFE did not

offer sufficient benefits or services to warrant the membership cost. P19 commented, “No benefits that meet my needs.” Being on a fixed income affects financial health. P29 remarked, “The Cost of membership is too high.”

Theme 3: Political and Advocacy Misalignment

Political stances that are misaligned may alienate members and contribute to dissatisfaction. Two factors, advocacy and leadership, can potentially affect the reasons for not renewing membership. Labor unions have encountered increasingly complex challenges concerning sustained membership and representation, especially amid changing political and economic landscapes. Again, misalignment with political stances may alienate members and contribute to dissatisfaction. The following are subheadings under Theme 3: Advocacy is Less Valued, and Leadership.

3.1. *Advocacy is Less Valued*

On the other hand, there could be specific issues or policies causing disagreement. For example, P33 reported, “I see little evidence that the advocacy has impacted me as a retired federal employee.” Consequently, it was found that a younger and new generation of prospective members have little interest in advocacy. On the other hand, Rosenfeld and Kleykamp (2009) found that Hispanic populations tend to join unions at higher rates than other demographic groups, indicating that targeted engagement strategies may be necessary.

3.2 *Leadership*

Research has shown that diminished trust in leadership can negatively impact member engagement and organizational participation, as evidenced by Elkins (2019) in the context of Toastmasters International. Likewise, Hatcher (2017) noted that ineffective leadership strategies contribute to declining union membership. These insights are consistent with the findings of the present study, which revealed that perceptions of ineffective leadership within NARFE were

influential in participants' decisions not to renew their memberships. As in other member-based organizations, leadership within NARFE appears to be a critical determinant of trust and long-term member retention. Data analyses of surveys from current members revealed the following themes.

Current Members Findings.

Theme 1: Advocacy and Representation

Advocacy is a critical reason for continued membership, suggesting it is a unique selling point for NARFE. NARFE represents members on Capitol Hill, and its members highly value the organization's lobbying efforts to protect and enhance federal employee and retiree benefits. Therefore, lobbyists can support or oppose the legislation proposed by Congress. The following are subheadings under Theme 1: Positive Benefit, and Advocacy is Highly Valued.

1.1 *Positive Benefit*

Current members receive clear communication about NARFE's activities, achievements, and advocacy efforts, which fosters trust, loyalty, and a desire to remain members. There is a decline in some organizational memberships where interactions are not conducted over a participative face-to-face connection with others in a group setting but electronically (Li et al., 2022). When there is member commitment, retention rates are positively boosted (NARFE, 2024).

1.2 *Advocacy is Highly Valued*

Advocacy remains a highly valued component of NARFE membership, as members benefit from direct representation in Washington, D.C., through the organization's professional advocacy staff. This function is considered one of NARFE's core competencies and differentiates it from comparable membership-based organizations (Paul & Donnelly, 2019). NARFE's government affairs team is actively involved in monitoring, influencing, and

communicating federal legislative and regulatory developments that impact current and retired federal employees. Similarly, organizations such as the American Retired Association (ARA) have emphasized the importance of experienced government affairs professionals in advancing members' interests in Washington, D.C. (ARA, 2024). However, findings from the current study indicate that some NARFE members have expressed concern regarding the visibility and effectiveness of advocacy efforts, suggesting that while advocacy is a perceived strength, there may be gaps in communication or engagement that contribute to membership dissatisfaction and non-renewal.

Theme 2: Community and Networking

Social connections and shared interests contribute to member satisfaction and retention. Members can connect through the FEDhub (NARFE network) on any subject, and participation is encouraged. Webinars are another way to be engaged when networking. The following are subheadings under Theme 2: Participation and Community Building.

2.1 *Participation*

Participation has emerged as a key factor in promoting member satisfaction and retention. Gruen et al. (2000) and Blount (2023) found that members reported greater enjoyment and a stronger sense of belonging when offered opportunities to engage in interactive and meaningful organizational activities. This finding is supported by the current study, which revealed that NARFE members appreciated social connections and shared interests cultivated through chapter meetings, conferences, and advocacy-related events. When members are able to connect with others who share similar professional backgrounds and retirement concerns, their sense of community and organizational commitment is strengthened. Enhancing these participatory experiences may serve as a valuable strategy for reinforcing member loyalty and encouraging long-term retention within NARFE.

2.2 *Community Building*

NARFE provides an essential advocacy engagement through community-building with its members. Professional associations provide an essential standpoint for knowledge development, engagement, collaboration, community-building, and an appreciation of professional distinctiveness (Huang et al., 2022). NARFE protects the welfare and benefits of the federal community through its efforts in lobbying Congress.

Theme 3: Information and Education

Educational resources and updates are valued but underutilized by some members. Information is provided through emails and the magazine. Social media to reach potential members is done through Facebook by offering White Papers. The following subheading is under Theme 3: Education.

3.1 *Education*

In his study results, Walton (2017) stated that 71% of the 150 participants considered continuing education to be of more significant benefit when considering joining a professional organization. Membership organizations that deliver quality educational programs create more opportunities to develop stronger affective attachments among the members (Gruen et al., 2000).

Theme 4: Social Involvement to Stay a Member

Social Interaction and Organizational Culture Contribute to Members' Emotional Investment. This theme highlights the critical role of social involvement and organizational culture in cultivating members' emotional connection to NARFE. Participants indicated that opportunities for interpersonal engagement, particularly through chapter-level interaction—play a substantial role in sustaining their commitment to the organization. As a mission-driven association serving federal employees and retirees, NARFE benefits when its members experience a sense of inclusion, affiliation, and shared purpose. The following are subheadings

under Theme 4: Interaction Through Purposeful Activities, and Socializing Belonging, Identity, and Retention.

4.1 *Interaction Through Purposeful Activities*

Chen (2005) found that member engagement increases when activities meet both personal and social needs. Study participants expressed that local chapter events, such as meetings and educational programs, serve not only to inform but also to connect members. One participant (P73) noted, “Meetings. It’s always good to see fellow members and listen to speakers,” emphasizing the value of face-to-face interaction and structured social experiences. These findings are consistent with Maslow’s Hierarchy of Needs, specifically the third level—love and belonging—which identifies the human need for social connection and interpersonal relationships as central to well-being (Sirgy, 1986; Tudor & Petre, 2021). Offering opportunities to meet and engage with like-minded individuals, NARFE helps fulfill this essential need, strengthening members’ sense of loyalty and satisfaction.

4.2 *Socializing Belonging, Identity, and Retention*

Renström et al. (2021) observed that individuals often seek out groups that foster a sense of belonging and self-worth. This aligns with Social Identity Theory, which posits that individuals define part of their self-concept through their association with social groups (Stets & Burke, 2000). Participant P68 articulated, “I am a part of a social group of former federal employees who share my interest in protecting our earned retirement benefits.” This quote emphasizes how shared identity and collective purpose contribute to sustained membership and emotional investment in the organization. Strengthening opportunities for social engagement and reinforcing members’ connection to NARFE’s mission may further enhance satisfaction and retention.

Limitations

This section outlines the limitations of the study and their potential impact on the research findings. This study's limitations pertained to the researcher, applied survey techniques, participants, and research approach, which might have impacted or influenced the interpretation of the findings (Bloomberg & Volpe, 2019). Limitations are those things that might have affected the outcome of research, but the researcher has no influence or control over them (Shipman, 2014). Limitations not previously uncovered were revealed and could have potentially affected a study's transferability, outcome, and conclusions (Ross & Bibler Zaidi, 2019). A limitation became apparent where additional probing questions were omitted and limited the ability to obtain a greater depth of information. The findings from this research could have been lessened because research disclosures could have only applied explicitly to the NARFE organization. There could have been limitations in designing a research project due to what represented the best democratic approach, with participants being what Herr (2014) described as insiders or outsiders. The insiders continued to be loyal members, while the outsiders were the dropped members who had discontinued their membership. Some of the unforeseen limitations were those of participants who, to a degree, procrastinated or, when prompted by the question, did not elaborate on any specifics that could have brought a broader cognitive answer. The participant may have been unwilling to participate due to a potential bias in interpreting the questions (Simundic, 2013). Each participant was informed about the purpose of the research study, which could have increased the level of cognitive dissonance experiences recalled by participants. Former members who opted not to respond may hold different views than those captured in the data. Another limitation of the study was the method used to collect data.

The findings support the needs assessment design but could not be supported by Quantitative hypotheses involving numeric estimates of population values and relying on

statistical procedures. Therefore, this researcher pursued a qualitative needs assessment design to facilitate open-ended research questions, allowing for a deeper exploration of the factors influencing NARFE's membership decline through data collection and analysis. Other theories underpinning this research are social identity theory, reference group theory, and the theory of cognitive dissonance. Social identity theory could underpin its assessment of its services, where individuals viewed themselves as members of NARFE, not realizing that their needs were necessary to carry on the business, and where NARFE does not uphold its values and beliefs.

The survey was conducted online, and the response rate was exceptionally low. This low response rate imposes on the generalizability of findings. Since the selected sample population was very small during the period, it may not have reflected the entire population's accurate picture, which lacked broad representation (Ebo, 2019). The themes do not explore how different demographics (e.g., age groups) might value NARFE differently. Younger members or newer retirees may have had distinct priorities compared to older members. While cost-effectiveness is mentioned, there is no detailed exploration of how members weigh the value of advocacy, community, and resources against the cost of membership. While health or personal issues are mentioned, there is little exploration of other barriers (e.g., lack of digital literacy, time constraints) that might limit being a member, especially for older members. Members may have found that the information provided does not always apply to their specific situation or needs. By addressing these limitations, NARFE could better understand its members' needs and improve engagement and retention strategies. However, existing membership studies had some limitations; there were relatively few qualitative studies on declining membership or increased recruitment of members in various organizations. This limitation justified the need for future research to be conducted. There could have been limitations evident in critically reflecting on the researcher's stated study limitations, which could influence the conclusions (Zhou & Jiang,

2023). There could have been limitations regarding what policy and practice changes needed to be implemented to facilitate the expected outcome for the organization and whether the solution was transferable to broader societal issues. Changes in policies and procedures should be evaluated and tested for success or failure, as they could have had an impact on the issue. Furthermore, a conceptual framework does not provide a “perfect or complete explanation of what is being studied,” as Bloomberg and Volpe (2019, p. 306) claimed. However, based on the limitations and the study’s analysis, a clearer view was accessed to interpret its findings and make recommendations supporting the conceptual framework.

Recommendations to Leaders and Practitioners

This section presents recommendations to enhance NARFE’s membership engagement and retention strategies based on organizational commitment and research findings. Organizational commitment and member commitment to the NARFE organization (see Table 7) provided positive benefits such as high retention rates, increased income, and greater advocacy strength (NARFE, 2024). The following recommendations are aligned with the identified themes, limitations, and research gaps to improve NARFE’s membership engagement and retention strategies. Leaders and practitioners could lessen the decline of membership by implementing these recommended organizational commitment and retention strategies (a) membership retention, (b) attracting new members, (c) value proposition, (d) financial accessibility, (e) advocacy representation, (f) foster Community and Connection, (g) digital resources and (h) organizational communication.

To convey how leaders and practitioners might mitigate the problem, leaders and practitioners can address recommendations for future research. These recommendations also address conditions focused on attracting prospective and retaining current members.

Table 7*Recommendations for Leaders and Practitioners*

Focus Area	Recommendations for Leaders	Recommendations for Practitioners
Membership Retention	Highlight and communicate tangible benefits to members clearly. Address financial concerns by exploring tiered or discounted membership fees.	Develop targeted outreach campaigns emphasizing benefits. Personalize member interactions to highlight value.
Attracting New Members	Increase the visibility of NARFE's advocacy efforts and success stories. Collaborate with federal agencies to introduce NARFE to younger employees.	Organize workshops/webinars to showcase NARFE's benefits. Leverage social media to reach potential members.
Value Proposition	Regularly assess and adapt membership benefits to address the changing needs of active and retired members.	Create educational content that resonates with different member demographics.
Financial Accessibility	Consider financial aid or a sliding scale for retirees on fixed incomes. Bundle high-value perks to justify membership cost.	Promote cost-saving opportunities (e.g., perks, discounts) during member recruitment.
Advocacy & Representation	Increase transparency in lobbying efforts and outcomes. Balance advocacy priorities to reflect diverse member needs.	Share advocacy updates regularly through newsletters or events. Collect member input on advocacy priorities.
Community Engagement	Revitalize local chapters by addressing accessibility challenges and fostering leadership.	Host virtual and in-person events to enhance member connections.
Digital Resources	Improve website usability and organization. Expand training on FEDhub and Federal Benefits Institute.	Create tutorials and guides to help members navigate digital tools effectively.
Organizational Communication	Enhance communication channels to ensure consistent and timely updates. Use feedback mechanisms to improve member satisfaction.	Personalize communication through member segmentation (e.g., age, career stage).

Note. The following implied recommendations are for each of the results.

Membership Retention.

The following are to illustrate commendations for retaining membership. These can be applied or implemented by NARFE for internal and external initiation for improvement. These will also bring value to the organization.

- a) Suppose NARFE changed its present status and became a Non-profit organization, as identified in 26 U.S.C. 501(c)(3). In that case, members of NARFE could be able to deduct a contribution or donation of any funds given to NARFE from their taxes. At present, NARFE's membership fee is not deductible.
- b) Highlight and communicate how membership contributions are used, highlighting tangible outcomes like advocacy victories and new initiatives.
- c) Regularly gather feedback from current, lapsed, and potential members to track evolving preferences and challenges.
- d) Continue the dues withholding program, whereby members receive a 15% monthly dues reduction from their annuity.
- e) Establish a financial assistance fund for members experiencing hardship, enabling them to retain membership while facing temporary financial constraints.
- f) Impress an automatic renewal system with credit card deductions on the yearly plan being paid for.

Attracting New Members.

The following are commendations for attracting new members. NARFE makes these feasible for marketing, member engagement, and digital improvement. They will also bring younger members to the organization.

- a) Develop marketing campaigns targeting younger retirees, emphasizing modernized benefits like digital resources and flexible participation options.

- b) Customize engagement efforts based on demographic insights, recognizing that different age groups may value distinct aspects of NARFE membership.

Value Proposition.

The following are commendations for bringing value to members. NARFE makes these possible by giving advice to members on issues pertaining to them. They will also be attracted to valuable information that will benefit them.

- a) Highlight the value of having access to expert advice on complex issues like federal retirement procedures, benefit entitlements, and understanding technicalities regarding government employment.
- b) The NARFE organization assists with specific member needs, such as answering questions about benefits, navigating forms, and dealing with complicated retirement issues.
- c) The organization's representation in Washington, D.C., and its lobbying efforts on Capitol Hill are repeatedly critical benefits.
- d) NARFE provides valuable and up-to-date information on federal benefits, retirement procedures, health insurance, and legislative developments through its website and magazine, emails of daily news clips, webinars for staying informed on relevant topics, etc.
- e) Discount programs, scholarships, and other perks are noted as valued, albeit secondary, benefits.
- f) Members have offerings as added incentives to remain engaged with the organization, such as reduced membership fees (1, 2, or 3 years, dues withholding, etc.).
- g) Availability of webinars, Q&A sessions, and articles addressing specific member concerns (e.g., retirement navigation, COLA updates, open season, and health insurance).

Financial Accessibility.

The following are commendations for introducing financial value to members. NARFE can make these conceivable by offering savings when renewing their membership. Advising members on issues about perks that are available to save them on spending.

- a) Stress and reintroduce tiered membership plans with varying costs, such as one, two, three, and possibly more years, when fees are reduced. This will benefit and accommodate retirees on fixed incomes. Offer other memberships or incentivize renewals with loyalty rewards.
- b) Continue developing and promoting programs that offer direct, measurable benefits, such as discounts, exclusive webinars, and practical guides tailored to federal retirees and active employees, indicating the worth of membership.

Advocacy Representation.

The following are commendations for gaining more participation in advocacy. Members need awareness of the benefits of advocacy to their welfare. Communicate with members by publishing information on advocacy through various media avenues to educate.

- a) Regularly educate members on how NARFE's advocacy work directly saves federal employees and retirees money, emphasizing the financial return on their membership investment. Introduce success stories, such as the repeal of the WEB/GPO, or testimonials from current members to showcase the real-world impact of NARFE's work through the media and the NARFE magazine.
- b) Conduct surveys to understand members' policy priorities and align advocacy efforts accordingly to reduce alienation.

- c) Emphasize bipartisan advocacy to appeal to a broader audience and minimize political polarization among members with increased transparency in advocacy. Look at how advocacy can be reframed to appeal to a broader demographic.
- d) Regularly publish detailed reports outlining NARFE's lobbying efforts, challenges, and successes, reinforcing the value of advocacy work.
- e) Express the importance of the 'Take Action' occurrences to create opportunities for members to participate directly in advocacy efforts, such as letter-writing campaigns or town halls with legislators, to foster a sense of contribution and ownership.
- f) Ensure action alerts are mobile-friendly and intuitive for quick responses.
- g) Provide brief tutorials on the importance of advocacy and how easy it is to participate.
- h) Promote success metrics from advocacy efforts (e.g., bills passed) through emails, FEDHub, and chapter meetings.

Foster Community and Connection.

The following are commendations for encouraging more participation in the local community. Members need to be aware of the available ways to connect with other members, such as the FEDhub (a NARFE community network). Advise members that there are chapters that are available to join.

- a) Clearly communicate how membership contributions are used, highlighting tangible outcomes like advocacy victories and new initiatives.
- b) Express the chapter's local involvement in social inclusion. Many chapters have websites for local information.
- c) Introduce success stories or testimonials from current members to showcase the real-world impact of NARFE's work through the media and the NARFE magazine.

Digital Resources.

The following are commendations for creating networking resources to increase participation in the local community. Members can also use the NARFE advocacy Action Line, where emails are sent to representatives to take action for or against a pending Bill on the Hill. Members must be aware of the NARFE website, which is available to connect to webinars concerning different facets of livelihood.

- a) Create localized events through the Federations and chapters for networking opportunities to strengthen personal connections among members.
- b) Offer online forums or discussion groups for members to share experiences and resources, particularly in areas of mutual interest like financial planning or navigating federal benefits. FEDhub is a beneficial source that could provide this and more besides the availability of Webinars.
- c) Provide training for older members on navigating online platforms, such as virtual event participation or online renewal processes.
- d) Simplify digital interfaces to make them more user accessible to members with varying levels of digital literacy.

Organizational Communication.

The following are commendations for communication with members. NARFE communicates with members through the NARFE magazine, which has articles on retirement issues. Conventions, conferences, and local community visits to one's congressional representative are also available to attend.

- a) Create localized events and networking opportunities to strengthen personal connections among members expressing participation in state conferences, conventions, and national conferences.

- b) Offer other online forums or discussion groups for members to share experiences and resources, particularly in areas of mutual interest like financial planning or navigating federal benefits.

Implementation Steps.

1. Form a task force to prioritize and execute recommendations.
2. Pilot initiatives in smaller chapters before rolling out nationally.
3. Establish regular review cycles to assess the effectiveness of implemented strategies.

The determination for increased membership in NARFE may have been answered by the enthusiasm, vitality, and attractiveness to join and offer a service or product that is appealing to a newer member. NARFE should reevaluate its technique for attracting prospective and retaining current members by looking closely at consumer behavior (Harris, 2021). By addressing these areas, NARFE could reverse the trend of declining membership, strengthen its advocacy capabilities, and foster a loyal and engaged community. Furthermore, see Table 7 for Recommendations for Leaders and Practitioners. Recommendations for future research also addressed conditions focused on attracting prospective and retaining current members, including effective engagement strategies, membership incentives, and organizational culture improvements.

Recommendations for Future Research

Recommendations for future research included replicating this study using a qualitative case study approach focused on attracting prospective and retaining current members. Since the researcher, in this case, used a smaller sample size, the first recommendation was that in any future investigations, consider using a larger sample to validate and confirm the current outcomes. A second recommendation was that, if possible, one-on-one interviews be conducted as the responses in this dissertation were online and open-ended questions and the responses

did not have or reveal adequate explanations through elaborative narrative answers to the survey questions (Loseke, 2012). The third commendation was that future scholars should consider using different inferential measurements to double-check whether the findings can be similar to the ones achieved in this study. For this, the researcher recommended that the key themes and discernments discovered within this research project be studied through either another qualitative study or quantitative research. The findings were also described to offer a rationale for conducting future research (Ridley, 2012).

Following the scholar-practitioner-leader (SPL) model, one has scholarly development as a person with knowledge through a program of research and critical thinking. The knowledge, skills, abilities, and work styles acquired would apply to personal effectiveness in any occupation (Fox et al., 2021). Adopting the SPL model of scholar-practitioner-leader in practical terms will effectively resolve problems and lead to enhanced leadership in the organization. As a doctorate practitioner, one could apply a platform for real-world knowledge to any organization's business work environment or even to a nonprofit organization that encompasses the participation, involvement, and mission to serve public interests and social responsibility or to a not-for-profit organization that provides services for the benefit of individuals.

Conclusively, future studies should be conducted to establish if cognitive dissonance could reduce the emotional effects and attitudes contributing to a member's decision to renew or not renew their membership. NARFE could benefit from the results of a cognitive dissonance theory if the survey questions provided sufficient data to warrant applicable responses for understanding the participant's perception. More importantly, retaining membership might entail understanding the emotional and non-emotional cognitive factors that control a member's decision not to renew their NARFE membership. Therefore, it is knowing what outcomes cognitive dissonance has on recruitment or retention within NARFE.

Future research could use a quantitative study of social identity factors to ascertain the statistical inference of the role of social identity in NARFE attendance. Social exchange theory contributes to a better understanding of the mental engagement between members and the NARFE organization (Ali, 2022). Similar to the inference that sports fans have a common reference to their team through a social identity concept, developing a common reference could be researched to enhance dedication, social categorization, and group involvement that supports NARFE attendance. Research practitioners can use this study's findings and recommendations to gain a new understanding of applicable approaches that positively impact member commitment to retention. Lastly, Future studies could have been extended to apply the results of this study to other organizations experiencing similar dormant and declining membership trends.

Chapter Summary

Chapter 5 reviewed the research questions and explored the factors affecting membership retention through a member experience survey. Chapter 4 presented the analyses and findings for this study's qualitative data. The findings from the four guiding research questions were discussed, and the study results were compared to those of the existing literature. Data analyses of surveys from former members revealed the following three themes: Lack of Tangible Benefits, Cost and Financial Constraints, and Political and Advocacy Misalignment. The findings of these themes could be linked together to improve membership retention as well as the themes for current members. There were instances of an interpretive gap between data and conclusions (Broom, 2021). Data analyses of surveys from current members revealed the following four themes: Advocacy and Representation, Community and Networking, Information and Education, and Social Involvement to Stay a Member. The Chapter 5 is concluded. The significant research findings that have plagued the NARFE organization expressed the limitations and gave recommendations to leaders and practitioners, with recommendations for

future research that could contribute to the body of knowledge. It ends with the chapter summary.

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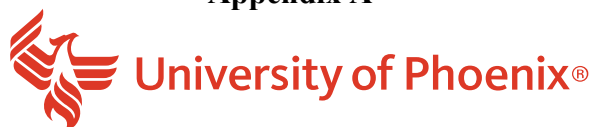
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Appendix A



RECRUITMENT DOCUMENT

[REDACTED]
[REDACTED] | [REDACTED] entitled "Decreased Membership Within the NARFE Organization: A Qualitative Case Study." I am recruiting participants to complete a short survey.

The NARFE Organization is sending you this letter on my behalf and will protect your personal membership information as the interlocutor.

You are eligible to participate as a current member of the National Active and Retired Federal Employees Association (NARFE). Your participation is crucial for this research study, which is strictly voluntary and designed to investigate decreased membership within the NARFE organization. The survey study questions will take at least 15-20 minutes to answer, depending on your responses to the 8 questions and 3 demographic background questions.

This study aims to explore why the National Active and Retired Federal Employees Association (NARFE) has a declining membership. The decline result is that NARFE's lobbying efforts for federal employees and retirees are less effective. This case study aims to understand better why many members have declined NARFE memberships, which will significantly affect their ability to influence lobbying efforts.

This survey will focus on retention, recruiting, and active membership within NARFE. If willing, as a participant, you can withdraw from the study at any moment. You can decide whether to be a part of this study or not. Once you start, you can withdraw from the study at any time without any repercussions.

If you have any questions regarding this study, you can contact [REDACTED]
[REDACTED], to get answers to your questions. For questions about your study participant rights, concerns, or complaints, please contact the University of Phoenix Institutional Review Board at IRB@phoenix.edu.

Once you click the link to go to Survey Monkey, you will receive an informed consent form to acknowledge your official participation. This will direct you to an online survey to complete and return. If you do not wish to participate, you will acknowledge that you do not accept participation, and you will be exited and removed from the study.

(Link to Survey Monkey to accept or reject participation)

Thank you for considering this opportunity to participate.

Appendix B



RECRUITMENT DOCUMENT

[REDACTED], I am conducting a research study entitled "Decreased Membership Within the NARFE Organization: A Qualitative Case Study." I am recruiting participants to complete a short survey.

The NARFE Organization is sending you this letter on my behalf and will protect your personal membership information as the interlocutor.

You are eligible to participate as a former member of the National Active and Retired Federal Employees Association (NARFE). Your participation is crucial for this research study, which is strictly voluntary and designed to investigate decreased membership within the NARFE organization. The survey study questions will take at least 15-20 minutes to answer, depending on your responses to the 8 questions and 3 demographic background questions.

This study aims to explore why the National Active and Retired Federal Employees Association (NARFE) has a declining membership. The decline result is that NARFE's lobbying efforts for federal employees and retirees are less effective. This case study aims to understand better why many members have declined NARFE memberships, which will significantly affect their ability to influence lobbying efforts.

This survey will focus on retention, recruiting, and active membership within NARFE. If willing, as a participant, you can withdraw from the study at any moment. You can decide whether to be a part of this study or not. Once you start, you can withdraw from the study at any time without any repercussions.

If you have any questions regarding this study, you can contact [REDACTED] to get answers to your questions. For questions about your study participant rights, concerns, or complaints, please contact the University of Phoenix Institutional Review Board at IRB@phoenix.edu.

Once you click the link to go to Survey Monkey, you will receive an informed consent form to acknowledge your official participation. This will direct you to an online survey to complete and return. If you do not wish to participate, you will acknowledge that you do not accept participation, and you will be exited and removed from the study.

(Link to Survey Monkey to accept or reject participation)

Thank you for considering this opportunity to participate.

Appendix C



Current Member Informed Consent Form

[REDACTED] I am conducting a research study and recruiting participants to complete a short survey. This study explores why the NARFE organization has a declining membership and aims to understand why it can affect lobbying efforts.

Your participation as a **current** member of the National Active and Retired Federal Employees Association (NARFE) is crucial for this research study to investigate decreased membership within the NARFE organization. You understand that your participation in this study is strictly voluntary. The survey study will take at least 15-20 minutes, depending on your responses to the questions, and each participant will answer the survey consisting of 8 questions and 3 demographic background questions. As a participant, you can decide whether to participate in this study or not and withdraw before submitting the survey from the study at any time by exiting the browser.

The potential risks of participating in this study are minimal to none. You understand that you have the right to refuse to participate in or withdraw from the study at any time without prejudice to your current or future standing as a past member. You also have the right to refuse to answer any question you choose not to respond to.

Although there may be no direct benefit to you, a possible benefit from your participation in this study is that it will help the NARFE organization improve its internal operations. There is no monetary compensation for participating in the research and no foreseeable risks to you. The research study results may be published, but your identity will remain anonymous, and your name will not be made known to any outside parties.

If you have any questions regarding the study procedures, you can contact [REDACTED], to get answers to your questions. If you contact me, you will compromise your anonymity, but your identity will remain confidential and cannot be connected to the data. For questions about your rights as a study participant or any concerns or complaints, please contact the University of Phoenix Institutional Review Board at [REDACTED]

As a participant in this study, you should understand the following:

1. You acknowledge that you have been asked to participate in this study of the National Active and Retired Federal Employees Association (NARFE).

2. If you withdraw prior to submitting the survey by exiting the browser but after submitting the survey, data will be included in the final report since it cannot be individually identified for removal.
3. Data from the responses to the questions can be withdrawn from the study after you have been surveyed and can be discarded.
4. Your identity will be kept anonymous.
5. [REDACTED], the researcher, has fully explained the nature of the research study and has answered all of your questions and concerns.
6. Data will be collected and maintained as electronic files. They will be kept on a USB thumb drive and secured in a floor safe until the researcher needs them. The data will be kept for three (3) years and then destroyed by deletion from the thumb drive.
7. The results of this study may be published.

By understanding the information in this consent form regarding your participation in the research project, you acknowledge this form below, represent that you are 21 years old or older, and give your permission to participate in the study described here by the option to click yes to participate in the survey, or No, you do not want to participate.

If you do not wish to participate, you will be exited and removed from the study by clicking not to participate. You are required to answer question one in Survey Monkey before proceeding. Thank you for considering this opportunity.

Appendix D



Former Member Informed Consent Form

[REDACTED] I am conducting a research study and recruiting participants to complete a short survey. This study explores why the NARFE organization has a declining membership and aims to understand why it can affect lobbying efforts.

Your participation as a **former** member of the National Active and Retired Federal Employees Association (NARFE) is crucial for this research study to investigate decreased membership within the NARFE organization. You understand that your participation in this study is strictly voluntary. The survey study will take at least 15-20 minutes, depending on your responses to the questions, and each participant will answer the survey consisting of 8 questions and 3 demographic background questions. As a participant, you can decide whether to participate in this study or not and withdraw before submitting the survey from the study at any time by exiting the browser.

The potential risks of participating in this study are minimal to none. You understand that you have the right to refuse to participate in or withdraw from the study at any time without prejudice to your current or future standing as a past member. You also have the right to refuse to answer any question you choose not to respond to.

Although there may be no direct benefit to you, a possible benefit from your participation in this study is that it will help the NARFE organization improve its internal operations. There is no monetary compensation for participating in the research and no foreseeable risks to you. The research study results may be published, but your identity will remain anonymous, and your name will not be made known to any outside parties.

If you have any questions regarding the study procedures, you can contact [REDACTED] [REDACTED], to get answers to your questions. If you contact me, you will compromise your anonymity, but your identity will remain confidential and cannot be connected to the data. For questions about your rights as a study participant or any concerns or complaints, please contact the University of Phoenix Institutional Review Board at [REDACTED]

As a participant in this study, you should understand the following:

1. You acknowledge that you have been asked to participate in this study of the National Active and Retired Federal Employees Association (NARFE).

2. If you withdraw prior to submitting the survey by exiting the browser but after submitting the survey, data will be included in the final report since it cannot be individually identified for removal.
3. Data from the responses to the questions can be withdrawn from the study after you have been surveyed and can be discarded.
4. Your identity will be kept anonymous.
5. [REDACTED], the researcher, has fully explained the nature of the research study and has answered all of your questions and concerns.
6. Data will be collected and maintained as electronic files. They will be kept on a USB thumb drive and secured in a floor safe until the researcher needs them. The data will be kept for three (3) years and then destroyed by deletion from the thumb drive.
7. The results of this study may be published.

By understanding the information in this consent form regarding your participation in the research project, you acknowledge this form below, represent that you are 21 years old or older, and give your permission to participate in the study described here by the option to click yes to participate in the survey, or No, you do not want to participate.

If you do not wish to participate, you will be exited and removed from the study by clicking no. You are required to answer question one in Survey Monkey before proceeding. Thank you for considering this opportunity.

Appendix E

Email Letter of Consent to use the Instrument

From: [REDACTED]
Subject: Re: Signatures needed on forms
Date: Oct 30, 2024 at 1:17:54 PM
To: [REDACTED]
Cc: [REDACTED]
nmacdonald@narfe.org

Good afternoon, [REDACTED] Attached is the PRN signed by Nora.
As far as data access and use permission, NARFE will act as the interlocutor, emailing your invitation to participate to a group of lapsed members who meet criteria you outline. IN this way, we will continue to protect the PII of lapsed ("once and future") members while also aiding you in connecting with research subjects. Please provide details for this communication and outline the query requirements in terms of length lapsed, etc. Only those members who agreed to accept "sponsored" email will be included in results.
Thank you in advance for your research into NARFE membership patterns.

[REDACTED]
Senior Director, Communications and Technology
[REDACTED]



606 North Washington St.
Alexandria, VA 22314-1914
Main Number: [REDACTED]

NARFE.org

From: [REDACTED]
Date: Tuesday, October 29, 2024 at 2:27 PM
[REDACTED] >
Subject: Re: Signatures needed on forms

Nora, thank you! I'll be in touch and keep you posted as things progress. I have five weeks to gather data and start an analysis.

[REDACTED]
Sent from my iPad

On Oct 29, 2024, at 11:37 AM, [REDACTED]

Hi Frank,

Appendix F



PREMISES, RECRUITMENT AND NAME (PRN) USE PERMISSION

{National Active and Retired Federal Employees Association (NARFE)}

Please complete the following by check marking any permissions listed here that you approve, and please provide your signature, title, date, and organizational information below. If you have any questions or concerns about this research study, please contact the University of Phoenix Institutional Review Board via email at [REDACTED].

Study Name:

Decreased Membership Within the NARFE Organization: A Qualitative Needs Assessment Study

Study Description: The purpose of this qualitative Needs Assessment study is to explore why the National Active and Retired Federal Employees Association (NARFE) has a declining membership. This case study aims to better understand why many members have declined NARFE memberships, which will adversely affect their ability to significantly influence lobbying efforts.

☐ I hereby authorize (Researcher name), a researcher from University of Phoenix, to use the premises (facility identified above and address below) to conduct this study.

☒ I hereby authorize [REDACTED] a researcher from University of Phoenix, to recruit subjects for participation in this study at the facility identified above.

☐ I hereby authorize (Researcher name), a researcher from University of Phoenix, to use the name of the facility, organization, university, institution, or association identified above when publishing results from this study.

Title and printed name of official granting permission:

[REDACTED] Director, Member Engagement

Signature of official granting permission: [REDACTED]

Date: 10/30/24

Address of Facility: 606 North Washington St., Alexandria, VA 22314-1914

Email Address: [REDACTED]

Phone Number: [REDACTED]

URL/Link (if applicable):

v.082019

Appendix G

Email Letter of Exempt Determination



Institutional Review Board
4025 S. Riverpoint Pkwy
Phoenix, AZ 85040

DATE: November 18, 2024

TO: [REDACTED]

FROM: University of Phoenix IRB

PROJECT TITLE: [2225126-1] Decreased Membership Within the NARFE Organization: A Qualitative Needs Assessment Study

SUBMISSION TYPE: New Project

ACTION: EXEMPT

DECISION DATE: November 18, 2024

REVIEW TYPE: Exempt Review - Category 2

Thank you for the submission of your research project titled Decreased Membership Within the NARFE Organization: A Qualitative Needs Assessment Study. Your submission was reviewed and has been DETERMINED EXEMPT. All research must be conducted in accordance with the protocol described in your submission.

This submission has received an Exempt Review based on applicable institutional policies and federal regulations.

The following also applies to your current submission:

1. Please note that if any revision is made to the Exempt study in the future such as, but not limited to, a change of venue for any data collection sites, change of subject group, data collection methods, etc., review by the University of Phoenix IRB of this revision is required prior to initiation. In this case, data collection should be suspended until there is an IRB decision reported to you. Please use the "Change of Study Template" form and submit with an updated copy of your IRB Application and all other necessary documentation.
2. Please remember that informed consent is a process beginning with a description of the project and assurance of participant understanding followed by a signed consent form. Informed consent must continue throughout the project via a dialogue between the researcher and research participant. Federal regulations require that each participant receives a copy of the consent document. If a Waiver of Informed Consent or a Waiver of Documentation of Informed Consent has been granted, you are required to follow the consent process accepted as part of the Waiver.
3. Keep in mind that any permissions for access to private data, private information for recruitment, or access to a private location for research must have one of the following documents indicating approval: Permission approved through a signed PRN, a signed Data Access and Use Permissions form, or permissions stipulated on an ink-signed letter on organizational/institutional letterhead, or an email that includes the authorizing person's title, organization, contact telephone number, address, and email for the person granting the permissions.
4. All unanticipated problems involving risks to subjects or others and serious and unexpected adverse events must be reported promptly to the University of Phoenix IRB Office. Please review

guidance materials for reporting unanticipated events and use the appropriate reporting forms for this procedure. All FDA and sponsor reporting requirements should also be followed.

5. All non-compliance issues or complaints regarding this project must be reported promptly to the University of Phoenix IRB Office at [REDACTED]

This project does not require continuing review by the University of Phoenix IRB.

Please note that all research records must be retained for a minimum of three years after the completion of the project. We will retain a copy of this correspondence within our records.

If you have any questions, please contact the University of Phoenix IRB Office at [REDACTED]
Please include your project title and IRBNet project number in all correspondence with the Board.

This letter has been electronically signed in accordance with all applicable regulations, and a copy is retained within University of Phoenix IRB's records.

Appendix H

Field Test Survey Questions for Former Participants

Prepared by NARFE Membership Engagement and the University of Phoenix approval

Thank you for taking the time to participate in this critical survey, which I am conducting as part of my research study entitled “Decreased Membership Within the NARFE Organization: A Qualitative Needs Assessment Study” for the University of Phoenix and the National Active and Retired Employee Association. This survey is under the supervision of [REDACTED] support faculty in DOC-741 Doctoral Dissertation at the University of Phoenix. The survey includes questions about your NARFE membership experience and should take a few minutes to complete. The results will be used to improve Narfe’s organization's membership and its members' programs and services. The following questions are to help answer the question of “How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?” I’m looking for the right questions to ask for the most responsive answers that will give insight into the members' decision NOT to maintain their membership. What are your suggestions? Are the questions above suitable, or do you have a more agreeable question(s)?

1. What are your top reasons for not continuing your membership with NARFE? Please elaborate!
2. What reasons or experiences do you feel NARFE did not offer or meet your needs?
3. How can NARFE motivate you to renew your membership?
4. What NARFE benefits do you value enough to renew your membership?
5. What benefits do you feel NARFE can offer to retain you as a member?
6. Explained how important to you is NARFE's advocacy department, which works to represent, preserve, and protect your benefits or education, which makes you more informed about the benefits you will receive?
7. Based on your response to question 1, what would be your top reasons for renewing your membership?
8. Are there any other comments you would like to make?

Appendix I

Field Test Survey Questions for Current Members

Prepared by NARFE Membership Engagement and University of Phoenix approval

Thank you for taking the time to participate in this critical survey, which I am conducting as part of my research study entitled “Decreased Membership Within the NARFE Organization: A Qualitative Needs Assessment Study” for the University of Phoenix and the National Active and Retired Employee Association. This survey is under the supervision of [REDACTED], support faculty in DOC-741 Doctoral Dissertation at the University of Phoenix. The survey includes questions about your NARFE membership experience and should take a few minutes to complete. The results will be used to improve Narfe’s organization's membership and its members' programs and services. The following questions are to help answer the question of “How can the National Active and Retired Federal Employees Association (NARFE) reduce the declining membership?” I am looking for the right questions to ask for the most responsive answers that will give insight into the members' decision to maintain their membership. What are your suggestions? Are the questions above suitable, or do you have a more agreeable question(s)?

1. What benefits do you feel NARFE offers to attract prospective members?
2. What benefits do you feel NARFE offers to retain you and current members?
3. Explain how important you feel NARFE's advocacy department represents, preserves, and protects your benefits.
4. Explain any communication with the Federal Benefits Institute, which answers questions on Social Security, TSP, Annuity benefits, Health Insurance, and other issues.
5. How have you benefited from using FEDhub, NARFE Magazine, NARFE perks, and the NARFE website?
6. How have you contacted your legislative representative through advocacy action alerts or other methods, which enhances NARFE’s position on Federal issues?
7. What other reasons have kept you as a dedicated member?
8. Are there any other comments you want to make?