

# CSEA SEIU Local 2001

## COUNCIL 400

### Annual Retiree Plan

*Ensure that the creation and development of this plan includes significant involvement of your fellow retiree leaders (elected and not-elected) and your Local Union leadership and staff.*

**PLEASE NOTE THAT IN COMPLING THIS INFORMATION, INPUT FROM APPROXIMATELY 400 MEMBERS WAS ASKED AT CSEA COUNCIL 400 EXECUTIVE COMMITTEE, DELEGATE COUNCIL, CHAPTER MEETINGS AND PHONE CALLS DURING APRIL AND MAY 2009 AND INCORPORATED HEREIN.**

#### SUMMARY

Provide a 1-page summary on the basic state of your retiree program. Include information about 1) its structure, 2) its strengths and 3) its challenges.

#### STRUCTURE

1. Our retiree council has been in existence since 1962. Chapters have been added as our membership grew and moved to other states.
2. The decision and policy making arm of the Union is the CSEA SEIU Local 2001 Executive Council (with representation from all the Councils of the Union) on which 4 retiree delegates and 2 retiree alternates are seated. The program for the CSEA Council 400 is adopted by the delegates to the CSEA Council 400 based upon input from their Executive Committee and standing committees.
3. The Council 400 Executive Committee consists of a President, Vice President, 2 regional Vice Presidents, Treasurer, Assistant Treasurer, Secretary, Assistant Secretary, delegates and alternates to the Executive Council, and chairs of the various committees.
4. There are three standing committees in Council 400: Legislative Action Committee, Membership (Organizing) Committee and Nominating Committee. There is also an Audit committee which meets once a year. All chairpersons are appointed by the Council President.
5. Each chapter is entitled to a minimum of five delegates plus alternates that attend the monthly CSEA Council 400 delegates meeting. There are 16 Connecticut chapters, 7 Florida chapters, 2 South Carolina chapters and 1 Massachusetts (Cape Cod) chapter. Each chapter has an executive committee and other pertinent committees (e.g. auditing) with individual by-laws that are consistent with the CSEA SEIU Local 2001 Constitution and CSEA COUNCIL 400 by-laws.

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6. Chapters are chartered through a petition to the CSEA Council 400 Executive Committee, the delegation at large, and then the CSEA SEIU Local 2001 Executive Council. To create a chapter at least 30 members have to commit to that chapter and create a leadership structure and by-laws, then they are considered a chartered chapter upon its approval.
7. CSEA Council 400 and its chapters are audited yearly and the audits are kept on file at CSEA's headquarters.
8. The Council has one full time staff, a Retiree Coordinator and additional staff support (Executive Director, Organizing Director, clerical and communications)
9. Every 2 years, prior to the biennial convention, CSEA Council 400 and chapter officers are elected by the retirees. Executive Committee officers are nominated by the chapters through a CSEA Council 400 Nominating Committee with representation from each chapter. The slate of officers is presented at the June meeting with nominations accepted from the floor. Robert's Rules of Order are maintained.
10. The Connecticut chapters of CSEA Council 400 meet monthly, September through June. The Executive Committee meets monthly throughout the year. The Carolinas, Florida, and Cape Cod meet periodically throughout the year. Staff and the Executive Committee liaison attends these meetings as do speakers chosen by the chapters.
11. The Council, chapters and individuals contribute generously to the McCusker Scholarship Fund (Scholarships for children and grandchildren of members attending post-secondary schools) and the Local's Political Action Committee Fund (COPE).

### **STRENGTHS OF THE COUNCIL AND CHAPTER STRUCTURE**

1. All by-laws of the Council and its chapters are consistent with the CSEA SEIU Local 2001 Constitution.
2. Roles and responsibilities of the Council/chapter officers are defined in the by-laws. Information is shared with members through Council/chapter meetings, CSEA News, CSEA website, e-mail, mailings, and direct phone calls.  
The retiree delegates and alternates on the CSEA Executive Board are the voice for retirees in decisions and policies of the union
3. There is a working relationship between active employees and retirees. This relationship is beneficial for both political strength and support. One of the co-chairs of the CSEA Legislative Action Committee is a retiree and the other is an active member. The Social Activities is chaired by a retiree with active and retired members. Other Committees of the Union also have retiree members.
4. Chapters have a certain amount of autonomy to meet their individual chapter needs
5. Retirees are actively included on the local's decision making body: the Executive Council that has representation of all active and retiree Councils and chapters.
6. Many of our members are politically active either through speaking with local, state, and congressional legislators, writing, calling or e-mailing them and writing editorials for local papers. They attend rallies on issues of concern to them, the Union (e.g. March 25 rally around state services at the Capitol) and greater community. The Union provides transportation from its headquarters to the Capitol to lobby on issues with their local, state, and federal legislators. Members hold positions in their local governments in positions such as registrars of voters, on town council, town political councils, finance committees, etc. and at the State level in the Connecticut General Assembly.
7. As stated under the "structure" there is staff dedicated to the retirees. The retirees have a voice in decisions at the Health Care Cost Containment Committee (Joint Labor/Management Committee that manages the State's active and retiree health insurance program), the State Treasurer's Investment Advisory Committee, the Connecticut Alliance for Retired Americans and other boards and committees. The Executive Director plays a significant role in disseminating information.
8. Our members are any CT public sector retiree (and their spouse). They are of diverse backgrounds, agencies, rank and file, municipalities, elected officials, management, etc.

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9. Members participate on the Union’s Good Works committee (e.g. Thanksgiving meals), collection of food, gifts for children, and cards for people in nursing homes.
10. Members volunteer in their communities and places of worship, and are aware of the pulse of their communities. This helps members to affect local policy and share this information with their Chapter and CSEA Council 400.
11. Having 12,000 members gives us a substantial voice in Connecticut politics.
12. The size of the organization creates a public image on “strength in numbers” and that the CSEA Council 400 cares about retirees and their issues.
13. Union dues are \$4 per month. (The local retains \$3.00; CSEA Council 400 receives \$1.00 and rebates from that amount 25 cents to chapters.)

### **CHALLENGES**

1. Increasing membership in CSEA Council 400 and active participation at the chapter level.
2. The perception that CSEA COUNCIL 400 is for ‘old’ people, not the newly retired.
3. Although information is disseminated through various avenues, it is not always timely which effects participation in events.
4. Members have conflicting schedules that limits their participation in chapter meetings.
5. Sometimes the union dues are viewed as too much and there is a lack of understanding of what members get for their dues.
6. There appears to be apathy among younger retirees to join a retiree union.
7. Members often believe that their benefits are guaranteed for life.
8. Tracking which retirees are active in the political arena to post concerns, editorials, etc. Many of our retirees do not access computers and rely upon other members, chapter meetings, phone calls to the local, or CSEA News.

## MEMBERSHIP DATA & GOALS

Fill in the chart below to map out your 2009 membership figures and your goals for 2010. Make sure your local is setting ambitious goals for itself, encourage your local to rise to the challenge! The 2008 SEIU Convention mandates that retiree membership grows at a minimum of 5% per year.

How many members does your Local want to have by the year 2020? 15,000 (This is your 10 year goal)

| Membership Data  | 2009 Figure                      | 2010 goal                                |
|--|----------------------------------|--|
| <b># of official retired members</b><br><i>For more information on what it means to be an “official member” refer to the SEIU Retiree Advisory Council’s Best Practices and Recommendations, section entitled “Building your Membership”, subsection “Step 4 – Sign them up to be official ‘members.’”</i> | as of August 26, 2009<br>11, 893 | 12,488<br><br><i>Minimum 5% increase</i> |
| <b># of active retiree members</b>   | 1,250                            | 1,350                                    |

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### Membership Recruitment

**List the challenges that exist within your program that might get in the way of achieving your membership growth goals for 2010:**

#### **Challenges**

1. Increasing the number of member organizers active in recruitment activities. For example, most chapters have people who actively recruit non-members through home visits and phone calls by active member organizers (about 69%).
2. Younger state retirees have a lack of understanding of the organization.
3. Identifying potential leadership from the membership.
4. We have membership all over the country although we do not have organizational structure/chapters in all those areas.
5. Retiree apathy around political issues, such as national health care and the lack of understanding of the correlation to them as state retirees. Many retirees think that they have life time health benefits and that changes affecting Social Security, Medicare, the national health care reform debate will not affect them
6. Some members and non-members view the union as bipartisan.

**How will your local address each of these challenges this year?**

#### **Membership**

1. Developing and getting out timely targeted mailings to specific populations (especially younger and more recent retirees) as well as continuing the quarterly mailings and home visits by retired members and potential new members. We also rely on chapter meetings, the CSEA News, e-mails and the website. We have approximately 1,000 e-mails for retirees.
2. Develop a process similar to Maine that has employees sign up prior to retirement.
3. Extend our Connecticut chapters' geographical location to include surrounding states of Rhode Island, Massachusetts, and New York to increase attendance at chapter meetings.
4. Mapping where out of state retirees reside, to establish more chapters in those states.
5. Work with present leadership in their chapters to identify and train future leadership.
6. Work with Presidents and stewards of the active state and public sector employee councils to promote CSEA Council 400.
7. Work with our sister (e.g. Healthcare Employees District 1199, Congress of Connecticut Community Colleges) and other (e.g. American Association of University Professors, Connecticut State Police Union) unions, (without retiree councils) to recruit their members as they retire.
8. Working with SEIU in Florida to strengthen chapters and activate more members in the South.
9. Continue the 'Membership Contest' drive (monetary incentives for getting new members either through home visits (set up through the Local or by chance), phone calls, etc.)
10. One targeted mailing to potential non-members on an issue of concern (e.g. health care reform).
11. Continue quarterly 'generic' mailings to new state retirees.

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### **What is your overall plan/strategy to achieve your membership goals by the end of 2010?**

*For more information and ideas, refer to the SEIU Retiree Advisory Council's Best Practices and Recommendations, section entitled "Building your Membership."*

Recently, approximately 3,800 state employees retired through a Retirement Incentive Plan (RIP) negotiated by state employee unions. 357 retirees were CSEA members at the time of their retirement. We do not expect many state employees to retire over the next 3 years. These potential members are one of the key groups that we are targeting for recruitment.

1. Obtain completed list of 357 Rippers of CSEA. IT Director will match our members who are newly retired to active lists.
2. A mailing was completed to approximately 190 of active members who did not get a check from the State in July.
3. Mailing to our 357 Rippers will include an issue of importance (spousal option and the open window to choose again. Spousal option is the retiree's choice that if they predecease their spouse, he or she will get a percentage of the pension and state health benefits, a lifetime only option, etc.)
4. All Rippers will receive a targeted mailing.

We have been working on a three-prong approach to recruit new members. The first prong was calls to all non-member retirees asking them two questions:

- 1) *Do you trust the Governor and the legislature to honor their commitment to your retiree health care benefits now to 2017 and beyond?*
- 2) *Would you join an organization with thousands of other retired state employees, like CSEA Council 400, to protect your health care benefits?*

Second prong is a mailing to all non-members asking the first question again with a tear off membership card. The third and last prong is to home visit, where possible, anyone who answered yes to the 2<sup>nd</sup> question of the calls and did not respond to the mailing.

1. To contact, through home visits, the non-members who responded "Yes" to the SEIU call center using the SEIU software to coordinate routes for member organizers. Chapter member organizers (in teams) will receive a packet containing the name and addresses and suggested route for home visits. They will also receive training from current member organizers and staff. We ask that they speak from their own personal stories and the value of being a member of Council 400. An outline is available for them as reference.
2. To continue targeted mailings to non-members depending on issues and concerns.
3. To begin to develop a plan that can incorporate other than state public sector retirees to become involved in CSEA Council 400. Medicare, Social Security and a national health plan are issues of concern to all.

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### **Member Activism & Leadership development**

*It is vital that we are developing fellow retiree leaders and activists along the way. Most often we neglect to recognize that inspiring members to take action takes hard work. We have to intentionally develop our fellow members and empower them into leadership roles within the retiree program. How can your retiree program better develop leaders and activists? (refer to your 2010 active retiree membership goal above)*

1. Younger retirees are targeted to approach and recruit to be active. Both chapter (or if applicable Council) leadership and staff observes for leadership or activism interest. In elected positions, any member in good standing (within CSEA SEIU Local 2001 Constitution, CSEA Council 400 and chapter by laws) can run for office.
2. Newly elected leadership receives biennial training and support from members and staff.
3. Members are encouraged and recruited to contact their legislators, work on a membership drive, or be involved in other ways at their local level.
4. Leadership also recruits formerly active employees who have held leadership positions within our or other locals, such as stewards, officers, etc.
5. Members are also asked to approach potential family members and friends retired from public service for membership. Many of the members will approach a friend, but are not willing to participate in an active membership drive.

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### PROGRAM IMPROVEMENTS

#### Program Substance

##### **How will you improve other elements of your retiree program?**

*If your program has difficulty retaining members or inspiring members to be more active, then you may need to re-evaluate the opportunities and strategies your program uses (or does not use). What is missing? How can you re-energize your program to encourage others to join or be more active?*

**Meeting Structure & Purpose** – *What changes can you make to your meeting structure or procedures that will result in increased membership, retention and activity? Refer to the SEIU Retiree Advisory Council's Best Practices and Recommendations, section entitled "Program Components and Structure", subsection "Meeting Logistics."*

1. Survey membership of individual chapters on guest speaker preference and areas of interest. This should include, but is not limited to, alternatives to long term care coverage, healthcare reform, getting candidates to meetings, information about changes in health care plan, living wills. Actively get information out to members about upcoming speakers.
2. Current activists host a "new member orientation" at their home, or other location outside of normal meeting milieu
3. Pilot conducting early evening meetings, preferably in the Spring when there more daylight to attract younger retirees that may have taken on second careers or jobs.

**Communication** (i.e. newsletters, emails, phone calls, etc) – *What improvements can you make regarding communication with your retired members that will result in increased membership, retention and activity?*

1. Members to recruit new members through increasing home visits and phone calls.
2. Using the CSEA News to remind retirees to give the local their current e-mails.
3. Having a factual section (in addition to opinion pieces) of the newspaper dedicated to the issues of union retirees.
4. Staff and the union President attend meetings and communicate what is happening within the union, how it affects them or the community at large, and request further action.
5. Member to member contact to mobilize for events

**Program** (i.e. classes, speakers, benefits, etc) – *What improvements can you make regarding the retiree program and what it offers members that will result in increased membership, retention and activity? Refer to the SEIU Retiree Advisory Council's Best Practices and Recommendations, section entitled "Program Components and Structure."*

We need to stress information on health care, long term care and the misinformation about health care reform (for example, death panels) using those improvements indicated above.

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### Political Activity

**How politically active are your retired members? There is always room for improvement. What can your retiree program do to increase participation?** Refer to the SEIU Retiree Advisory Council's Best Practices and Recommendations, section entitled "Program Components and Structure", subsection "Political Engagement – Giving to the Committee On Political Education (COPE)."

### Politics

1. Electing a Governor in 2010 with a pro working families' agenda
  - by having candidates attend chapter, Council meetings and union sponsored forums and events
  - working on their town levels and positions
  - e-mails
  - member to member conversations, phone banking and other means of communication, especially when a candidate is endorsed by the union.
2. CSEA Council 400 has former and current state and federal legislators as members. CSEA Council 400 needs to better evaluate these members and make sure they are supporting our issues.
3. Members need to be reminded to contact the Local when they speak out publicly on a particular issue. This will enable us to better identify activists and to further involve them in activities.
4. The political program is created by the Retirees Legislative Action Committee with the assistance of the political director and would engage retirees in political actions.
5. Stress the importance of supporting PAC/COPE. The goals for PAC include raising \$2.00 per member for the year and getting a PAC 'check off' from their dues deduction amount.
6. Identify further people who are politically active through e-mails, call through and call to action through the CSEA News.
7. Work with Council LAC to develop phone tree within chapters to be able to mobilize quickly.
8. Use local media to publicize issues that are important to CSEA Council 400.

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### RELATIONSHIPS

#### Relationships – Local Union / State Council / International

- 1. How can your retiree program strengthen its relationship with your local union?** – *Does your retiree program have buy-in from Local Union leadership? Have you sat down with LU Leadership and requested their input into this plan? Are there ways you can better integrate the work of the retiree program into the LU? Meet with your LU leadership and discuss this together.*

We already have established and maintain an ongoing cooperative relationship.

- 2. How can your retiree program work with the State Council (if applicable) to coordinate with fellow local retiree programs and build a state-wide retiree effort?**

We already have a retiree member who sits on the State Council and brings the information back to the Executive Committee and delegates to the CSEA Council 400 and to the CSEA Council 400 and local LACs. We also have members that sit on other boards (e.g. CT ARA, local chapters AARP, health care partnership program) that have similar goals and objectives for retirees.

- 3. How is your retiree program working with RAC to help build a strong union-wide retiree program?** *Are you working with fellow locals and asking them to join the Council? Are you participating in the monthly RAC calls?*

Three staff participate presently in the monthly RAC calls and report back to all levels of CSEA Council 400, from the delegate and Executive Committee through the local chapters. We have recently identified a retiree member willing to serve on the SEIU RAC. We are awaiting final confirmation by the Council 400 President.

- 4. What are your retiree chapter / council committed to doing to help build the national program?**

Continue to participate in the monthly calls; have staff and chapter leadership work with SEIU Florida Coordinator to further our program in the FL chapters; stress at the local levels how working with the larger union strengthens our influence on issues that effect retirees and their families. Once approved by the CSEA Council 400, the Local will help implement the agreed upon program developed through the recent vision process.

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### Optional

## ANNUAL SUMMARY & BENCHMARKS

Use this chart below to quickly summarize your 2010 plan. This will help you track your progress throughout the year and clearly assign roles and duties. Insert the 3 main tasks/goals to be accomplished in each month that will result in progress towards your end of the year goals. Then list who is charged with making it happen.

|             | <b>Task/Goal 1</b>   | <b>Who?</b>  | <b>Task/Goal 2</b>   | <b>Who?</b>   | <b>Task/Goal 3</b>   | <b>Who?</b>                              |
|-------------|--|--|--|---|--|--|
| <b>July</b> | SEIU call center: potential new members-follow up Sept.  | Stacey   | Send mailings to 190 CSEA active members from RIP who did not receive a check-20 new members   | Bob, Stacey   | Begin to work with Council 400 leadership on developing CSEA Council 400 plan for SEIU RAC   | Bob, Ed, Exec. Comm., Members            |
| August      | Recruit members to attend health care reform events with Congress members-50 members   | Hollis, Matt, members  | Send mailing to quarterly retirees-400 new members   | Jason, Bob, Stacey  | Identify potential candidate for SEIU RAC  | Ed, Hollis, Bob                          |
| September   | -C418 (4Cs) to mail to new retiree non-members- 5 new members<br>-Coordinate databases to pursuer 1,200 "yes" responses to SEIU call ctr.<br>-Set up home visits targeting 1,200 "yes" responders; begin home visits-300<br><br>-targeted mailing on issue (spousal optional window extension) | -Chp. Pres & members<br><br>-Stacey, Mike, Hollis<br><br>-Hollis, Nancy, Stacey Member organizers<br>-Bob, Matt, Hollis, Jason | Finalize SEIU RAC plan   | Bob, Ed, Stacey, Hollis, Exec. Comm.  | Appoint member for SEIU RAC<br><br>-Begin to set up potential speakers for chp esp. around health plan and health care (on-going all year) | Exec Comm., Ed<br><br>-Hollis, Chp Pres. |
| October     | Develop plan for dues deduction/contribution to PAC/COPE<br>Targeted mailing: health care-30 new   | Bob, political director<br>Bob, Hollis, Matt, Jason  | -Continue home visits to non-members-250 new<br><br>-Begin working with LAC and political director for 2010 Governor election and mid-term elections: Invite announced candidates to Delegate meeting, chp to invite to local chapters | -Hollis, Nancy, Stacey, Member Organizers<br>-LAC members, chp members, political director, Hollis, Matt, Jason | Quarterly recruitment of July-Sept. retirees (literature piece)-100 new members  | Hollis, Stacey, Jason                    |

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|          |  |                                      |   |   |  |  |
|----------|--|--------------------------------------|---|---|--|--|
| November | Develop phone tree with current chapters for political action-5 members per chapter to initiate tree | LAC members, Hollis, chapter members | -Continue home visits, phone calls to potential non-members- 100 new<br>-Continue work on Governor's election | Hollis, Nancy, Member Organizers<br>-LAC members, chp members, Hollis, Bob, political director, Matt, Jason | Develop plan and work with leadership to identify potential chapter and council leadership-ongoing     | Bob, Hollis, Cathy (Union Pres), Exec. Comm. |
| December | Map outlining CT chapter for potential members to incorporate into present chapter                   | Hollis                               | -Phone call follow up to potential non-members-50 new<br>-Continue work on Governor's election                | -Member organizers<br><br>-LAC members, chp members, Hollis, Bob, political director, Matt, Jason           | Develop plan to work with sister and other unions without retiree councils to increase retiree members | Bob  |
| January  | Develop and obtain approval from the Comptroller's office ME type –pre-retirement sign up card       | Bob                                  | -Continue follow up phone calls to non-members-50 new<br>-Continue work on Governor's election                | -Member Organizers<br><br>-LAC members, chp members, Hollis, Bob, political director, Matt, Jason           | -Quarterly recruitment of July-Sept retirees-20 new<br>-Initiate plan with sister and other Unions     | Mike, Jason<br>Bob, Hollis                   |
| February | Identify chapter willing to 'pilot' an evening meeting-1 meeting; get chapter commitment             | Hollis, chp Pres, chp members        | Continue follow up phone calls to non-members-50 new members  | -Member Organizers  | Continue work on Governor's election   | -LAC members, chp members,                   |

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|       |   |  |  |                   |   |   |
|-------|---|--|--|-------------------|---|---|
|       |   |  |  |                   |   | Hollis, Bob, political director, Matt, Jason                            |
| March | Pilot chp evening meeting coordination                          | Hollis, chp. Pres.   | Continue follow up phone calls to non-members-50 new members | Member Organizers | Continue work on Governor's election                                    | -LAC members, chp members, Hollis, Bob, political director, Matt, Jason |
| April | -Pilot chp meeting<br><br>-Continue work on Governor's election | -Chp. Pres<br><br>-LAC members, chp members, Hollis, Bob, political director, Matt, Jason              | Begin home visits again-100 new members                      | Member Organizers | Chapters & Council to begin planning for elections in April, May & June | Hollis, Chp Nominating Comm.; Council Nominating Comm.                  |
| May   | -Chapter elections<br><br>-Continue work on Governor's election | -Chp. Nominating Committees<br>-LAC members, chp members, Hollis, Bob, political director, Matt, Jason | Continue home visits-50 new members                          | Member Organizers | Quarterly recruitment of Jan-Mar retirees-20 new                        | Mike; Jason   |
| June  | Council Delegates & Alternates elections<br>Council Elections   | Bob  | Continue home visits- 50 new members                         | Member Organizers | -Continue work on Governor's election                                   | -LAC members, chp members, Hollis, Bob, political director, Matt, Jason |

**Note:** Hollis and Nancy to oversee Member Organizers in Home visits and phone calls; Mike to provide lists, Stacey to provide routes

## **Retiree Annual Plan**

*Articles and targeted mailings to include, but not limited to (depending on space in paper and immediate needs of the Union):*

Spousal option window, Medicare Part B, Social Security rates, generic and brand name prescription drugs, and change in prescription drug plan, Home Visit Awards, SEIU RAC appointment of retiree member and purpose of the RAC.