

**RPEA STRATEGIC PLAN 2015-2017**  
**BLUEPRINT FOR COORDINATED ACTION:**

**Members, Chapter Leaders, State Leaders and HQ Staff**



1. Complete two (2) mailings per year through CalPERS to update contact information. RETENTION.
2. Determine loss rates statewide (for each of the four reasons) to establish a base of comparison. RETENTION.
3. Monitor AMBIA Communications as per contract. MEMBERSHIP—ANNUITANT [RETIREE] OUTREACH.
4. HQ will annually mail to chapter leaders: a) a HQ calendar/timeline indicating dates for the state newsletter, mailings of renewal reminders, processing of membership applications, and emailing of monthly chapter reports/rosters. b) information [bulletins or packets] explaining the process and timeline chapters should use in updating addresses, sending renewal letters, and communicating with beneficiaries. RETENTION.
5. Calculate quarterly loss rates (for each of the four reasons) to use for measuring success. RETENTION.
6. Chapter leaders will implement and maintain the process established to retain members: communicating with HQ to update addresses, sending renewal letters, and communicating with beneficiaries. RETENTION.
7. Publish a “stand alone” article in the state newsletter clarifying Beneficiary Membership, explaining the CalPERS “drop” process, and stating why beneficiary membership is important. MEMBERSHIP—BENEFICIARY OUTREACH.
8. Plan, initiate and implement 2015-2016 RPEA Membership Drive (coordinated efforts of state leadership, chapter leadership and members.) MEMBERSHIP—ANNUITANT [RETIREE] OUTREACH.
9. Each chapter will compile local contact lists based on their members’ referrals, will complete a chapter recruitment mailing, and will do follow-up contacts. MEMBERSHIP—ANNUITANT OUTREACH.
10. Each chapter will provide incentives for beneficiaries to attend luncheon meetings and to join RPEA. MEMBERSHIP --- BENEFICIARY OUTREACH.
11. Timely (scheduled) contacts with the beneficiary of a deceased annuitant member will be made by both HQ and the local chapter to encourage RPEA membership. MEMBERSHIP—BENEFICIARY OUTREACH.
12. Complete a state mailing to all CalPERS Agency HRs as an update about RPEA and AMBIA benefits. MEMBERSHIP— AFFILIATE OUTREACH-- VISIBILITY
13. Meet with HR directors or their designees to establish on-going communication, to provide recruitment materials and (if allowed) to distribute recruitment materials in staff rooms or alternate work sites. MEMBERSHIP—AFFILIATE OUTREACH-- VISIBILITY.
14. Place CalPERS Agency HRs on state and (as assigned by area) chapter newsletter mailing lists. MEMBERSHIP— AFFILIATE OUTREACH-- VISIBILITY
15. Publish an article in each chapter newsletter about Associate Membership— that anyone can join RPEA (not just CalPERS Retirees). MEMBERSHIP— ASSOCIATE OUTREACH.
16. Each chapter will utilize their most current Prospective Members Roster (provided by HQ) for on-going recruitment with mailings, newsletters, phone calls and emails. MEMBERSHIP – VISIBILITY – ANNUITANT OUTREACH.
17. Open up new avenues of communication to currently-employed public employees in order to initiate additional recruitment opportunities. For example, a) Represent RPEA at agency health fairs, benefit forums, pre-retirement meetings, etc. b) Give recruitment materials to public employees encountered “on the job.” c) Have RPEA Affiliate Members become contacts for fellow workers. d) Place ads or small articles in agency newsletters e) Place names on chapter mailing lists using “referrals” by chapter members (people they worked with prior to retirement). VISIBILITY.
18. Maintain “stakeholder” relationship with CalPERS: a) Representation at CalPERS Board and committee meetings b) Provision for CalPERS Board members and representatives to be guest speakers at General Assembly and chapter meetings. VISIBILITY.
19. Participate in CalPERS Educational Events. VISIBILITY.
20. Contact each CalPERS Regional Office Manager to make an appointment at which RPEA is introduced, questions and concerns are addressed, and arrangements are made to distribute RPEA materials as an on-going activity. VISIBILITY.
21. Initiate letter/email communications with legislators as appropriate. VISIBILITY.
22. Take direction from Aaron Read and Associates in regard to legislation and related issues. VISIBILITY.
23. Initiate communication with local officials to introduce them to RPEA. VISIBILITY.
24. Initiate chapter (annual) community projects. VISIBILITY.