

Retired Public Employees' Association (RPEA)



Chapter Recruitment and Membership Chairperson Manual

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INTRODUCTION

For as long as RPEA has been in existence, we have endeavored to devise new and more successful methods to entice retirees, and we have initiated an exciting program to recruit currently-employed individuals to join our organization.

As you have heard many times, recruitment and retention of members is the lifeblood of RPEA. By the very nature of our makeup, our rate of attrition is problematical, and we must be ever vigilant to maintain our numbers, let alone accomplish the necessary growth to keep us in the position of playing a vital role in the welfare of our members. It is to the advantage of every member of this Association to participate in this effort.

There are great ideas in this manual—proven strategies, sample letters and examples of promotions or chapter activities—to help accomplish our membership goals.

It is the Membership Committee's desire that this manual assist chapter Membership Chairpersons in their efforts to make their individual chapters grow, and thus keep RPEA strong for the benefit of all members.



(Excerpts taken from the introduction letter from "Pat Fink, Past Director of Membership -2006)

RPEA Organization

General Assembly is the governing body of the Association. The authority and responsibility of the elected Board of Directors is defined in the Association's Bylaws and Policy File.

The State Board of Directors is comprised of four officers, five Directors and nine Area Directors, one for each of the nine geographical areas of the organization. Each Area Director has a number of Assistant Area Directors who together assist some eighty-five active chapters in California, Arizona, Nevada, New Mexico and Oregon.



OFFICERS

- President
- Vice President
- Secretary Treasurer
- Immediate Past President

DIRECTORSHIPS

Public Relations

- Responsible for editing and publishing the bimonthly newsletter
- Make recommendations to the Board relative to:
 - (a) Communications to the membership. and*
 - (b) The Association communication systems*
- Chair the Public Relations Committee

Health Benefits

- Keep us informed about all forms of health benefits available to members and recommend changes deemed desirable
- Resist changes deemed detrimental to members
- Collect, research and disseminate relevant information to the Board and chapters
- Serve as Chair of the General Assembly Ad Hoc Committee considering resolutions pertaining to Health Benefits and insurance
- Chair the Health Benefits Committee

Legislation

- Collect, research and disseminate relevant information about State and Federal legislation to the Board and the Chapters;
- Coordinate legislative activities and make recommendations to the Board relative to legislative priorities
- Serve as Chair of the General Assembly Ad Hoc Committee considering resolutions pertaining to legislative matters
- Chairs Legislative Committee

Membership

- Make recommendations to the Board relative to membership programs
- Initiate and coordinate the producing of brochures, membership recruitment programs and forms for use by chapters;
- Develop membership guidelines for chapter officers
- Receive and disseminate input from the chapters
- Responsible for keeping Area Directors and Assistant Area Directors informed so that they can discharge their duties to their chapters efficiently
- Chairs the Membership Committee

Member Services

- Investigate and recommend to the Board insurance, product and service discount programs that provide significant benefits or cost reduction to RPEA members not otherwise available to them
- Monitor and report to the Board on the quality and performance of such programs that have been adopted by the Board
- Provide educational and informational material to RPEA members in the area of Consumer Affairs;
- Recommend actions or positions in the area of Consumer Affairs
- Chairs the Member Services Committee

Area Director

- Supervise the promotion of and adherence to the objectives of the Association
- Assist in organizing new chapters and member recruitment
- Assist existing chapters with membership recruitment efforts
- Represents his/her area as a member of the Board of Directors
- Reports Board activities to the chapters and simultaneously acts in the best interests of the Association
- Recommend Assistant Area Director appointments to the Board;
- Assign duties to the Assistant Area Director(s)
- Attend Chapter meetings as necessary;
- Attend Board of Directors meetings
- Develop and lead workshops to educate and inform chapter officers and interested members

Assistant Area Director

- Share the duties of and interact with the Area Director
- Act as a liaison between the Area Director and the chapters
- Take a direct leadership role in keeping chapters in good standing
- Stay informed on current subject matter
- Attend chapter meetings as assigned
- Attend meetings called by the Area Director
- Assist in area workshops
- Serve as a Delegate to the General Assembly

CATEGORIES OF MEMBERSHIP

Active Members

- **Annuitants (Retiree):** All retired persons who receive an annuity from CalPERS shall be eligible for active membership in the Association.
- **Beneficiary:** Persons who are spouses or domestic partners or are named or statutory beneficiaries to the pension rights of an Annuitant Member. Beneficiary members shall enjoy all rights and privileges of Annuitant Members including eligibility to hold Association office or area directorship. An active member may also participate as an associate member in another chapter.



Affiliate Members

- Affiliate members are persons who are currently employed members of CalPERS. Affiliate members shall enjoy all the rights and privileges of active members, except they are ineligible to hold Association office or area directorship until they become active members.

State Associate Members

- Persons who are not eligible for Active or Affiliate membership, but who support the purposes and goals of the Association and desire to give personal and financial support to the Association. These members shall enjoy all the rights and privileges of active members, except they are ineligible to hold State Association office or area directorship. This category may include:
 - a) *Family members of active members*
 - b) *Persons associated with RPEA business and activities*
 - c) *Retired public employees not covered under CalPERS*
 - d) *RPEA Headquarters staff*

Chapter Associate Members

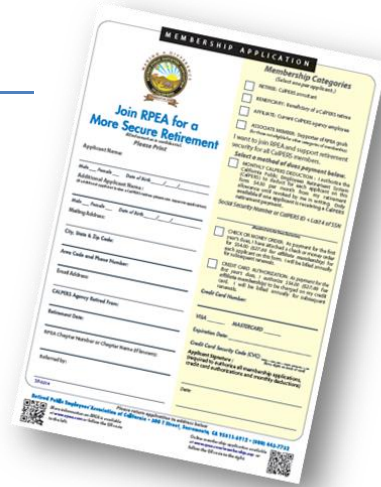
- Persons who are not eligible for Active or Affiliate membership but who support the purposes and goals of the Association, and will contribute to the furtherance of those objectives
- Chapter Associate members shall enjoy all the rights and privileges of the Active members, as may be limited by each chapter, but are ineligible to hold State Association office, area directorship, or serve as a Delegate to the General Assembly. Therefore, chapter associate members should be encouraged to switch to a full membership.
- Chapters may establish the amount of Chapter Associate dues, if any, which are retained by the chapter and should be reported under the "Other Income" category on the annual chapter financial report.

MEMBERSHIP APPLICATION PROCESS

Membership applications received at the chapter level should be forwarded to the Headquarters Office immediately so they can be processed in a timely manner.

New members should be encouraged to sign up for monthly dues deduction from retiree warrants. This not only allows the member to bypass the annual renewal process, but saves money for RPEA. Annual-payment of dues is also available using check or credit card.

All payment options are also available online at www.rpea.com.



CHAPTER ASSIGNMENT

All persons who become members of RPEA shall be assigned to a chapter of their choice as indicated on their membership application form. If no selection was made, the member will be geographically assigned to the chapter whose meeting location is closest to the address provided on the application form.

MEMBERSHIP FORMS AND LETTERS

The position of chapter Membership Chairperson is one of the most important positions of responsibility. It is the lifeblood of the organization. It is through our individual and combined efforts that the organization will not only thrive, but continue to grow.

Membership & Recruitment Tools Available to Chapters from the Headquarters Office

This section of the Manual will deal with those forms and letters that are necessary for Membership Chairpersons to complete their jobs efficiently and almost effortlessly. The forms listed below are available from our Headquarters Office. Additionally, we recommend that you develop contact letters using your own words. Samples of such letters are included, and you may copy or edit them to formulate your own letters.



- *Active & Retiree Marketing Packets*
- *Bimonthly Newsletter*
- *Informational Flyers (Scare/Feel Good Sheet)*
- *Quick & Easy Guide for Recruitment & Retention*
- *Recruitment & Retention Guide*
- *Public Information Officer e-mail Blasts from Marketplace Communications*
- *Affiliate Member Letter & Application Form*
- *Membership Application Form*
- *Prospective Member Benefits Brochure*
- *Current Member Benefits Brochure*
- *Sample Membership Letters:*
 - (a) Renewal Letter 1*
 - (b) Renewal Letter 2*
 - (c) We Want You Back Letter*
 - (d) Not Attending Meetings Letter*
 - (e) Invitation to Attend Meetings Letter*
 - (f) Prospective Member Letter*
 - (g) Prospective Member Letter (SCORE)*
 - (h) Public Agency Manager/Director*
- *Monthly Membership Reporting Form*

- *“About RPEA” Pop-Up Tabletop Banner*
- *Postcards (various recruitment messages)*

Chapter letters should be typed on Association letterhead from the Chapter Membership Chairperson or member responsible for membership activities.

SCORE



The SCORE program has proven to be the most effective way of obtaining members for local chapters. SCORE is an acronym for Statewide Coalition of Retired Employees and is comprised of representatives from several public employee organizations, who attempt to keep retirees informed about issues that may affect their pensions and benefits. Of these many organizations, RPEA is the only one representing ALL CalPERS annuitants.

SCORE has successfully negotiated with CalPERS to conduct, in each odd-numbered year, a membership drive that brings in several hundred new members. The success of this program hinges not only on the work and coordination efforts of our Headquarters staff, but also the efforts of each chapter and their membership committees—in other words, YOU.

In the spring of each odd-numbered year, CalPERS includes an inquiry card from SCORE with every outgoing pension check or deposit advice sent to retirees or their beneficiaries. The card gives the retiree the option to receive information from any of the participating organizations. The completed cards are then mailed back to RPEA, sorted by class and mailed to the various organizations who are members of SCORE. We are then in a timed competition to recruit those persons who have expressed an interest in an organization such as RPEA.

At the RPEA Headquarters Office, the responses are entered into our database under the category of “prospective” member. Our Headquarters staff then sends a letter inviting the retiree to join along with other recruitment materials. The content of this mailing is determined by the Membership Committee. RPEA follows this initial mailing with two additional mailings from Headquarters. One six weeks from the date of the initial mailing and again in the fall. Mailings from our chapters are not mandatory; however, in early January, lists of those prospective members who have yet to join RPEA are sent to our chapters, and we ask that they make one more attempt to contact the prospective member on a more personal level by either a phone call or a recruitment letter directly from the chapter (see *Sample Prospective Member Letter*).

FINDING NEW MEMBERS



Each chapter should attempt to publicize their meeting dates/time/location and program information in the community calendar section of their local newspaper.

The following is a list of locations where, with permission, recruitment materials may be placed:

- *Senior Centers*
- *Public Libraries*
- *Credit Unions*
- *Local fairs, bazaars, community events and health fairs*
- *Local government personnel offices or bulletin boards*
- *Information booths*

Make sure you make contact, either by phone or letter, to everyone on a prospective member list sent to you from Headquarters.

Keep records on prospective new members and periodically check back with those who have not joined.

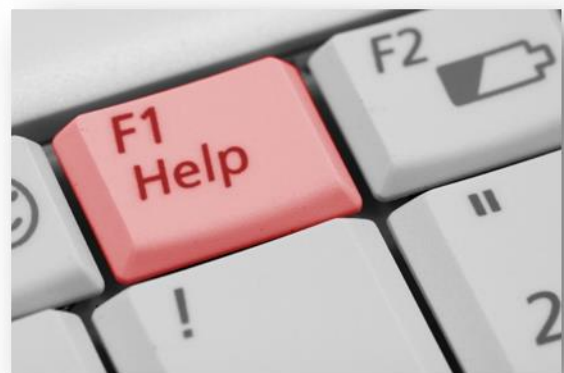
Acrylic brochure stands can be purchased at such places as Staples, Office Max, etc., and placed in locations where seniors congregate or do business. These should display the RPEA logo and contain Special Edition newsletters, and membership applications, together with information on how to contact your local chapter.

NEW MEMBER RECRUITMENT ASSISTANCE

It is recommended that a chapter Membership Chairperson attempt to form a committee composed of a representative from each of the member groups (state, school, and contract agencies). The rationale is then to have input from each retired group as to the needs of individuals within the group. We recognize how difficult it is to recruit volunteers to serve on committees, but we hope you will give it a try. Now that we are all retired, we share many common needs and concerns, particularly in the health care and legislative arenas.

Where does the Committee or Chairperson go for help? There are many resources within the Association to assist you.

- *There is probably a previous Membership Chairperson within your chapter who can provide information or assistance. Your chapter President is also a resource and may have a wealth of information.*
- *Your Area Director or Assistant Area Director should be able to answer most questions. If not, they have the resources to obtain whatever information you need. This is their function, so do not hesitate to approach them.*



- *Headquarters staff is always available to assist you. They are there to serve us all.*
- *The RPEA Administrative Manual*
- *RPEA Policy File*
- *RPEA Bylaws*
- *RPEA Chapter Officer Handbook*
- *Director of Membership*
- *Headquarters Office*

The solution to any problem will likely be found within the above resources.

ANNUAL REPORTS

It is a known fact that recruiting new members is at the heart of RPEA. Without new members we cannot achieve our stated goals, i.e., to enhance and protect our retirement benefits. It is important that each chapter track their



achievements during the year and share their successes and/or failures with the State Membership Committee. These reports will provide valuable information about how best to target a chapter's recruitment efforts.

Every new member is a cause for celebration, and some chapters are more successful at recruiting than others.

Geography, local cost of living (which affects lunch costs), available transportation, meeting location and programs are just a few of the factors

affecting not only recruitment, but also attendance at meetings. The Membership Committee wants to help you celebrate your successes. If you are having difficulties recruiting new members, perhaps we can help. Therefore, it is important that we hear from you.

It is suggested that at the end of each year, each chapter submit the following information on RPEA letterhead:

- *Efforts made during the year to attract new members. Successful recruitment efforts will be shared with other chapters.*
- *Number of new members from each of the following sources: transfers from other chapters; prospective member lists provided by Headquarters; new members based on chapter recruitment efforts*

It won't take much of your time to provide this information. Just keep track of the numbers and submit the data to the attention of the State Membership Director. Furthermore, this information will also be reported to you on the monthly membership reports you receive from the Headquarters Office.

CHAPTER REIMBURSEMENT FOR RECRUITMENT EFFORTS

Chapters actively attempting to recruit new members (all chapters) should keep receipts related to those efforts. At some time during the year the Area Director should be contacted to review efforts made and expenses incurred. Once the Area Director has approved the expenditures, a claim for reimbursement should be submitted to Headquarters Office.

We hope that those chapters with healthy bank accounts will absorb some of these recruitment costs at the chapter level, such as postage, mileage and reimbursement for free lunches to prospective or new members.



DEATH OF A MEMBER



If you become aware that a member of your chapter has passed away, immediately transmit that information to the Headquarters Office, either by phone or e-mail. Headquarters will coordinate with CalPERS regarding deduction of member dues, etc. If the member was a cash payer, a refund of any unused dues for the calendar year in which the member passed away will be made upon request from the survivor(s).

Upon learning of the death of a member, the RPEA Office Manager sends a note of condolence to the survivors, if known. At the chapter level, it is suggested that you send out a condolence card. If possible, remain in contact with the survivor to encourage him/her to join RPEA to protect their survivor benefits.