



LEADERSHIP HANDBOOK

2025 Edition

LEADERSHIP HANDBOOK

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1. Organizational Information

Constitution for Retired Public Employees Council of Washington AFSCME Retiree Chapter 10

Preamble

To unite retired public employees in an organization devoted to protection of retirees' rights, improve their welfare and happiness and to give the retirees a strong voice in making their views and concerns clearly known, we adopt this constitution. The Retired Public Employees will work with other retiree and active employee groups to accomplish these goals.

Article I - Name and Headquarters

Section 1. The name of this organization shall be: Retired Public Employees Council of Washington, Retiree Chapter 10, a non-profit organization incorporated under the laws of the State of Washington, and its state headquarters shall be located in Olympia, Washington.

Section 2. The headquarters hereinafter will be referred to as the council office.

Article II - Affiliations

Section 1. This organization shall be affiliated with the American Federation of State, County and Municipal Employees, AFL-CIO, and for this purpose only shall be known as the Retired Public Employees Council of Washington Retiree Chapter 10 (AFSCME). This retiree chapter shall at all times be subject to the constitution of the American Federation of State, County and Municipal Employees, AFL-CIO.

Section 2. Affiliation with other organizations shall be the prerogative of the executive board provided that only the convention may authorize an affiliation that requires payment of dues and fees in excess of \$1,000.00 on an annual basis as a condition of such affiliation.

Article III Purpose

The purpose of this organization shall be:

- A. To unite retired public employees for their mutual welfare.
- B. To protect public employees' retirement benefits by seeking and supporting the full funding of the Public Employees' Retirement System.
- C. To protect the retirement rights of Retired Public Employees Council of Washington (RPEC) members as provided under the constitutions of the United States and the State of Washington and the laws promulgated thereunder.
- D. To secure public employee retirement benefits geared to the changes in the Seattle consumer price index.
- E. To secure continual upgrading of OASDI retirement benefits.
- F. To support and secure an adequate national health care coverage.
- G. To support and secure continued consumer protection legislation.
- H. To work with other organizations on programs of mutual benefit, including advocacy and leadership training programs.
- I. To promote social activities for members, their spouses and guests.

Article IV Membership

Membership in the Retired Public Employees Council of Washington is open to:

- A. All persons eligible to receive pension benefits from the Washington Public Employees Retirement System, regardless of whether they have begun receiving those benefits and as long as they were former employees of the public sector earning Washington Public Employee Retirement Systems benefits, and their spouses or designated beneficiaries.
- B. Washington Public Employee Retirement System employees who are within 18 (eighteen) months of retirement may become Associate Members of RPEC. These members will receive the newsletter and may attend conventions and chapter meetings but may not vote and may not be delegates until they become retired, dues paying members.
- C. Non-federal public employee retirees, including retired staff employees of Washington state public employee unions, in the State of Washington and their spouses or designated beneficiaries, other than those who retired under the Law Enforcement Officers and Fire Fighters Retirement System.
- D. No person otherwise eligible for membership in RPEC shall be denied membership, because of race, creed, color, national origin, ethnicity, sex, age, sexual orientation, gender identity or expression, disability, immigration status, or political belief.

Article V - Chapters

Section 1. Chapters shall be established by geographical area or by other suitable categories such as employee affiliation. A minimum of twenty-five (25) retirees and spouses in an area must be dues-paying members before consideration will be given to issuance of a charter. In general, the jurisdiction and establishment of each chapter shall be approved by the Retired Public Employees Council Executive Board. In the event there is a jurisdictional dispute between chapters or disagreement by the petitioners with the council's executive board, the final decision shall be made by the next convention of the Retired Public Employees Council of Washington.

Section 2. The minimum officers elected by each chapter will be a president, vice-president, secretary, treasurer or a secretary-treasurer. These elected officers shall constitute a chapter executive board. Additional executive board members may be elected.

Section 3. Nominations and elections of chapter officers shall be carried out by one of the following methods:

- A. Nomination at the March meeting, elections conducted by secret ballot at the April meeting, and installation of officers at the conclusion of the April meeting.
- B. Nomination and election by secret ballot at the April meeting and installation of officers at the conclusion of the April meeting.

Section 4. The AFSCME Retiree Election Manual shall prevail at all chapter elections.

Section 5. No funds of the chapters or council can be spent in campaigning for an elective office of the chapter or the council.

Section 6. Chapters shall schedule chapter meetings to suit the needs of chapter members, but meetings shall be held not less than quarterly.

Section 7. Chapter meetings shall be conducted in accordance with this constitution.

Section 8. Chapters shall be governed by the uniform chapter constitution as contained in Appendix A of this constitution. Any changes in this uniform constitution adopted by the chapters shall be submitted to the executive board of the Retired Public Employees Council of Washington for final approval prior to

such constitutional changes becoming effective.

Section 9. New members shall be assigned to a chapter according to their geographic location, except those who have retired from the University of Washington, King County and Western State Hospital. These members shall be assigned to the chapter designated exclusively for retirees of those agencies unless the member requests otherwise.

Section 10. When members, except those from the chapters specified in Section 9, change their place of residence they will be reassigned to the chapter in their geographic area. Prior to reassignment, they may notify the council office, in writing, that they prefer to remain with their current chapter and no reassignment will be made. When the members of the chapters specified in Section 9 change their place of residence they will remain members of their current chapter unless they request a reassignment in writing.

Section 11. Members may request reassignment to another chapter at any time provided the request is made in writing.

Section 12. When a chapter member moves out-of-state, the member's chapter designation is not changed.

Section 13. Chapters shall be permitted to participate in the Retired Public Employees Council Convention.

- A. Each chapter shall be entitled to elect one (1) delegate for each twenty-five (25) members or nearest number thereof (i.e., a remainder of thirteen (13) or more will entitle the chapter to one (1) additional delegate) to the Retired Public Employees Council Convention. The number of delegates each chapter is entitled to elect shall be based on the number of dues-paying members on record with the council office as of the last day of February; provided, that chapters chartered after January 1 shall be entitled to representation based on their membership up to the month preceding that of the scheduled convention and, provided, that any chapter losing members to a new chapter shall have said members subtracted from its voting strength.
- B. The chapter may elect or designate a chairperson of the delegation and an alternate chairperson. The chapter shall report the names of the delegates, the chairperson and alternate chairperson to the council office according to the instructions in the convention call.
- C. Delegate registration forms shall be submitted and processed according to instructions contained in the convention call. No delegate shall be seated until after the registration fee has been paid and it has been certified by the chapter president or secretary that he or she is a duly elected delegate of the chapter.
- D. Only chapters having a delegate or delegates in attendance shall be entitled to vote its total membership strength regardless of how many delegates are present on all recorded votes and elections coming before the convention. The number of votes shall be divided equally among the delegates in attendance with any remaining votes to be cast by the chairperson of the chapter's delegation. No fractional votes shall be permitted. Delegates shall represent only the chapter to which they belong.
- E. Associate members, out-of-state members and chapter members not elected as delegates are welcomed and urged to attend the convention.

Article VI - Finances

Section 1. Membership Dues:

- A. Those members receiving monthly retirement benefits from a Washington retirement system may have deducted from their monthly payment their

dues of \$7.00 (seven dollars) per month and an additional \$7.00 (seven dollars) per month for their spouse, domestic partner and/or any person designated by them to receive a survivor benefit.

- B. Those members not electing DRS monthly dues deduction, or who are not eligible for a retirement system dues deduction, shall pay their dues directly to the Retired Public Employees Council office, by cash, check, (annual payment preferred) credit card, bill pay or other secure electronic payment from a personal account or credit card.
- C. From monthly dues receipts, the Retired Public Employees Council will transmit \$1.40 (one dollar and forty cents) to the appropriate chapter, supplying each chapter treasurer with an ongoing membership list; and will transmit required per capita payments to the American Federation of State, County and Municipal Employees, AFL-CIO, and shall retain the balance of the dues payment for council operations.

Section 2. Lapsed Membership. When a member ceases paying dues for a period of two months, he/she shall be dropped from membership.

Section 3. Expenditures from the council's general fund shall be in accordance with procedures and guidelines adopted by the council office.

Section 4. The council fiscal year is established as January 1 through December 31 of each year.

Section 5. Two signatures shall be required on all payments drawn on council funds. Council officers and the executive director may be authorized to sign checks.

Article VII - Officers

Section 1. The officers of this statewide Retired Public Employees Council shall be a president, a vice-president, a secretary, a treasurer and ten (10) district executive board members and these fourteen (14) shall constitute the Retired Public Employees Council Executive Board. Each district shall elect one executive board member, except district nine (9) shall elect two (2). District nine (9) shall elect no more than one district board member from a single chapter.

Section 2. To be eligible for office a member must be in good standing for six (6) months immediately preceding the election.

Section 3. No paid employee of the Retired Public Employees Council shall also serve as an officer of this organization.

Article VIII - Elections of Officers

Section 1. The president, vice-president, secretary, treasurer and district executive board members shall be elected for a two (2) year term. Officers and district board members shall be elected in even-numbered years.

Section 2. Nominations for president, vice-president, secretary and treasurer shall be made on the first day of the convention from the floor by duly accredited chapter delegates. Candidates or their designees shall be given the opportunity at the time of nomination to address the delegates not to exceed five minutes total. See Article X, Meetings and Conventions.

Section 3. If only one candidate is nominated, the presiding officer shall immediately declare said candidate elected by acclamation. If more than one candidate is nominated for an office, an election by secret ballot by the duly accredited chapter delegates present will be held on the second day of the convention. For the purpose of this election, each chapter shall be apportioned

its number of votes in each membership district based on the number of members in each chapter, and each delegate present shall be apportioned their number of votes as described in Article V, Section 13D, of this constitution.

Section 4. A majority of all the votes cast shall be necessary to elect a candidate. When more than two candidates are nominated for a single office and none of them receives a majority of all votes cast, all candidates except the two who received the most votes shall be dropped and a second ballot shall be cast.

Section 5. Nominations for and elections of the ten (10) district executive board members shall be conducted separately by those delegates representing chapters in their assigned district. For the purpose of this election, each chapter shall be apportioned its number of votes in each membership district based on the number of members in each chapter. For purposes of such elections the convention shall recess and the delegates shall caucus in the appropriate membership district groups; shall select a chairperson and recording secretary and conduct an election of the executive board member(s) to represent the members of each chapter in that membership district on the Retired Public Employees Council Executive Board. The election shall be conducted in accordance with procedures set forth in this constitution. Following the election of the membership district executive board members the convention shall reconvene and the results of the elections shall be announced by each of the membership district caucus chairpersons.

Section 6. Should a vacancy occur in the office of president, vice-president, secretary, treasurer, or any membership district executive board member of the council, such vacancies shall be filled by a majority vote of the executive board; provided: that district executive board members must be members of a chapter in the district they are elected to represent.

Section 7. The AFSCME Retiree Election Manual shall prevail at all convention elections.

Section 8. No funds of the council can be spent in campaigning for an elective office of the council. In addition to the guidelines provided in the AFSCME Retiree Election Manual, any member who announces his/her intention to run for elective council office may request one print mailing and one email distribution to chapter leaders and convention delegates. Candidates for office may request a mailing and emailing from the council office. All costs associated with the printing, mailing, and emailing will be covered by the candidate.

Section 9. Election and installation of officers shall take place at the annual convention. Installation format shall be as follows: "I ___, promise and pledge that I will perform faithfully and with honor the duties of the office, which I now assume in the Retired Public Employees Council of the American Federation of State, County and Municipal Employees. I pledge to fight for a society where all workers and retirees can seek economic and social justice through participation in their union and our democracy. I will work for these goals by organizing unorganized workers and retirees, mobilizing workers and retirees to participate in the political process, and fighting to gain and defend the best possible working standards through contracts and legislation. I acknowledge that it is a privilege to serve in this office and I promise that I will deliver to my successor in office all books, papers and other property of this council, which are in my possession at the close of my official term."

Article IX - Duties and Authority of Executive Board and Officers

Section 1. The Retired Public Employees Council Executive Board shall be the governing body of the council except when the convention is in session, and shall

have all authorities of the convention except the right to amend this constitution. Minutes of all executive board actions will be printed and promptly distributed to the president and secretary of each affiliated chapter and shall be open to inspection and review at the council office upon request of any member in good standing.

Section 2. The executive board shall implement policies and programs as determined by the convention. The board shall give a status report on all resolutions passed by the convention to the chapters at least 60 days prior to the next convention. The executive board shall approve rules and regulations governing hiring of staff, employment standards, salaries, personnel practices, and travel regulations after receiving recommendations from the executive committee.

Section 3. The executive board members shall attend conventions at the expense of the Retired Public Employees Council.

Section 4. By virtue of their office, the executive board members shall have a vote at conventions on all matters except elections. Only board members who are also a delegate from their chapters may vote in elections. On roll call votes they may vote as a board member or a delegate, but not both.

Section 5. An executive committee of the executive board shall be composed of the council president, who shall serve as chairperson; the council secretary, who shall serve as secretary; the council treasurer; and the vice-president. The executive director shall be a non-voting member. The Executive Committee shall meet on the call of the president or at the request of two or more of its members. The Executive Committee can meet by audio or video teleconference on the request of the president after the Executive Committee has adopted the policy set forth in Appendix E of the International Constitution. The Executive Committee shall develop and recommend to the executive board rules and regulations governing hiring of staff, employment standards, salaries, personnel practices and travel regulations. The Executive Committee shall review and make recommendations to the executive board on the annual proposed budget in accordance with policies and programs as determined in convention. The Executive Committee shall have the power to act on all matters on which the executive board is empowered to act, when, in the judgment of the president, action cannot be postponed until the next full board meeting, subject to the approval of the executive board at its next meeting. Minutes of the Executive Committee meetings shall be sent to all members of the executive board within ten (10) calendar days after such meetings

Section 6. The executive board shall create from its membership a Finance Committee. The Finance Committee shall be composed of the treasurer, who shall serve as chairperson; president and three (3) other members who shall be elected by and from the members of the executive board at the first meeting of the executive board held after the convention. Except for the treasurer and the president, executive board members who are members of the Executive Committee shall be ineligible to serve on the Finance Committee. Major expenditures of funds of the council, other than ordinary operating expenses, and the establishment of new staff positions shall be approved by the Finance Committee in advance. The Finance Committee is responsible for developing the proposed budget assuring that adequate finances are available to support the budget, presenting the proposed budget to the executive board for approval prior to the beginning of the fiscal year, and such other financial matters that are referred to the Finance Committee by the executive board. All acts of the Finance Committee shall be subject to the approval of the Executive Committee and executive board at its next meeting. Minutes of meetings of the Finance Committee shall be sent to the full executive board within ten (10) days after such meetings.

Section 7. In addition to the two standing RPEC committees, the Executive Committee and the Finance Committee, a Legislative Committee and Membership Committee shall be created as standing committees. The executive board will establish guidelines to govern the duties and responsibilities of the Membership and Legislative committees.

Section 8. All accounts of the Retired Public Employees Council shall be audited following the close of each fiscal year, or at the direction of the Retired Public Employees Council Executive Board, by a certified public accountant, who shall be appointed by the council treasurer with the approval of the council executive board. The audit report shall be provided to each delegate at the annual convention. In non-convention years, the audit report will be sent to chapter presidents.

Section 9. The president shall be the principal officer of the council and shall conduct the affairs of the council in accordance with this constitution and in accordance with the policy decisions of the convention and the executive board. The president shall preside at all meetings of the council, at all meetings of the executive board, appoint all committees subject to the approval of the executive board except the Executive Committee and the Finance Committee, and shall be a member ex-officio of all committees except election committees. The president shall have authority to call special meetings of the executive board or Executive Committee at any time; provided: That reasonable notice is given to board members. The president shall make the necessary arrangements for the annual conventions and for executive board meetings. At the conclusion of his/her term, the president shall submit a report to the council regarding official acts during such term in office.

Section 10. The vice-president shall actively assist the president in conducting the business of the council in every way possible. In the absence of the president, the vice-president shall preside at all meetings and perform all duties otherwise performed by the president.

Section 11. The secretary shall be responsible for preparing a record of the minutes of the council convention within thirty (30) days after the convention to ensure the final preparation and distribution of such minutes in a timely fashion to the affiliated chapters. The secretary shall also record the minutes of all Executive Committee and executive board meetings and distribute such minutes as required in Section 1 and 5 above.

Section 12. The treasurer shall be responsible for ensuring the maintenance of the membership and financial records; shall be the approving authority for all expenditures drawn on the council's funds, and shall be responsible for completion and filing of all pertinent federal and state government disclosure forms and federal income tax reports. The treasurer shall also provide a comparative financial statement to the convention for the months of January 1 through July 31 of the current year.

Section 13. District executive board members shall, when called upon and as required, visit the chapters within their districts. They shall oversee and ensure an effective communication network within their respective chapters. Board members shall report to the council president any significant activities of the chapters and ask the council president for assistance in solving problems. District executive board members shall take an active role in recruiting new members into the council and implementing the membership recruitment/retention plan approved by the executive board.

Section 14. The president shall be the official delegate of the council to the convention and/or any special meetings of the American Federation of State,

County and Municipal Employees. The vice-president shall be the first alternate of the council to the convention and/or special meetings of the American Federation of State, County and Municipal Employees. The treasurer shall be the second alternate, and the secretary shall be the third alternate in the event either the president and/or the vice-president are unable to attend.

Section 15. The executive director is the council's chief administrative officer and must give full time to the council. The executive director shall, under policies established by the executive board, employ, terminate, fix the compensation and expenses, and direct the activities of such staff as are required to carry out effectively the functions of this council. The executive director shall, under policies established by the executive board, engage such technical and professional services, including legal counsel and independent auditors, as may be required. The executive director, under policies established by the executive board, may sign all official documents and binding contracts of the council. The executive director may be the official spokesperson of the council when the president is not available, except where the executive board may otherwise specifically direct. The executive director shall be a non-voting member of the executive board and all standing committees of this council.

Article X - Meetings and Conventions

Section 1. Meetings of the executive board shall be called as necessary by the president, or at the request of five or more of its members, but there shall be at least two (2) meetings during each year. A majority of the members of the executive board shall constitute a quorum for the transaction of business. Meetings of the executive board shall be open to all members in good standing, except the president may call an executive session to discuss and act on personnel matters or active lawsuits where open discussion might do harm to the organization's cause. The executive board can meet by audio or video teleconference on the request of the president in accordance with Appendix E of the International Constitution. See Article VIII, Elections of Officers.

Section 2. A convention shall be held every other year, in even-numbered years between August 1 and October 31. The convention shall be of not more than two days' duration. Elections of officers and district board members shall be held at the biennial convention. A quorum for the transaction of business shall consist of not fewer than one-third of the delegates seated in the convention.

Section 3. The biennial convention shall be held at such time and place as is determined by the Retired Public Employees Council Executive Board.

Section 4. Special conventions may be called by a majority vote of the Retired Public Employees Council Executive Board.

Section 5. Notice of the biennial convention shall be sent to affiliated chapters at least ninety (90) days prior to the date set for the convention. At-large members shall be notified of the Retired Public Employees Council convention.

Section 6. Registration, rules, resolutions, legislative, constitution, sergeant-at-arms and elections committees shall be appointed by the president prior to the convention and these committees shall function at the annual convention or as required.

Article XI - Amendments to the Constitution and Bylaws

Section 1. Proposed amendments to this constitution and bylaws shall be submitted in writing to the council office, Olympia, Washington, at least forty-five (45) days prior to the biennial convention of the Retired Public Employees Council.

They shall bear the signature of the chapter president or secretary submitting them.

Section 2. Amendments may also be submitted by the council executive board and shall bear the signature of the council president or secretary.

Section 3. Each proposed amendment must be accompanied by a brief statement explaining why the amendment is needed.

Section 4. The council office shall submit proposed amendments to executive board members and to all chapters and convention delegates at least thirty (30) days prior to the biennial convention. The Retired Public Employees Council Executive Board shall review and make a recommendation to the convention on any proposal to amend the constitution.

Section 5. Two-thirds of the delegates voting shall be necessary for adoption of a constitutional amendment. Any adopted changes to the constitution must be sent to the American Federation of State, County and Municipal Employees within thirty (30) days of the adjournment of the Retired Public Employees Council Convention.

Section 6. Nothing contained in Appendix A (the chapter constitution) shall be in conflict with this constitution. In all cases, the council constitution shall prevail. Properly adopted amendments to this constitution shall, where applicable, automatically be incorporated into Appendix A (the chapter constitution).

Article XII - Miscellaneous Provisions

Section 1. Except to the extent specified in this constitution, no officer of the council shall have the power to act as agent for or otherwise bind the council in any way whatsoever. No member or group of members or other person or persons shall have the power to act on behalf of or otherwise bind the council except to the extent specifically authorized in writing by the president of the or by the executive board of the council.

Bylaws

All questions of parliamentary nature not provided for in the constitution shall be decided by Robert's Rules of Order Newly Revised.

Standing Committees

Standing committees will serve under the direction of the president.

Convention Committees

Registration, rules, resolutions, legislative, constitution, sergeant-at-arms and elections committees shall be appointed by the president prior to the convention and these committees shall function at the annual convention.

Resolutions

Section 1. Resolutions to the Retired Public Employees Council convention shall be submitted in writing at least forty-five (45) days prior to the convention to the council office, Olympia, Washington. They shall bear the signature of the chapter president or secretary submitting them.

Section 2. Resolutions may be submitted by the executive board of the council and shall bear the signature of the president or the secretary of the council up till noon or the first day of convention.

Section 3. Each resolution must be accompanied by a brief statement explaining why the resolution is needed.

Section 4. Copies of properly submitted resolutions shall be sent to delegates fifteen (15) days before the opening day of the convention.

Section 5. The president shall review all proposed resolutions, and assign them to the appropriate convention committee. The convention committee will make any necessary changes in them, consolidate resolutions where appropriate, and report its recommendations to the convention delegates.

Section 6. Resolutions may be submitted by chapters from the floor of the convention with copies provided to all delegates prior to the afternoon recess on the first day of the convention; provided: that the resolutions are accepted for consideration by a two-thirds (2/3) vote of those delegates in attendance. A special meeting of the appropriate committee shall be convened to consider these resolutions.

Section 7. A majority of the delegates voting shall be necessary for adoption of a resolution.

Approved by:

A handwritten signature in black ink that reads "Lee Saunders". The signature is written in a cursive, flowing style.

LEE SAUNDERS
President

Approval date: February 21, 2025

APPENDIX A
CHAPTER CONSTITUTION AND BY-LAWS
RETIRED PUBLIC EMPLOYEES CHAPTER NO.

PREAMBLE

To unite retired public employees in an organization devoted to protection of retirees' rights, improve their welfare and happiness and to give the retirees a strong voice in making their views and concerns clearly known, we adopt this constitution. The Retired Public Employees will work with other retiree and active employee groups to accomplish these goals.

ARTICLE I – NAME AND HEADQUARTERS

The name of this organization shall be Retired Public Employees Chapter Number _____, and its headquarters shall be in _____, Washington, or its vicinity.

ARTICLE II – AFFILIATIONS

This Retired Public Employees chapter shall be a subchapter of the Retired Public Employees Council of Washington.

ARTICLE III – PURPOSE

The purpose of this organization shall be:

- A. To unite retired public employees for their mutual welfare.
- B. To protect public employees' retirement benefits by seeking and supporting the full funding of the Public Employees' Retirement System.
- C. To protect the retirement rights of RPEC members as provided under the constitutions of the United States and the State of Washington and the laws promulgated there under.
- D. To secure public employee retirement benefits geared to the changes in the Seattle consumer price index.
- E. To secure continual upgrading of OASDI retirement benefits.
- F. To support and secure an adequate national health care coverage.
- G. To support and secure continued consumer protection legislation.
- H. To work with other organizations on programs of mutual benefit, including advocacy and leadership training programs.
- I. To promote social activities for members, their spouses and guests.

ARTICLE IV – MEMBERSHIP

See Retired Public Employees Council of Washington Constitution, Article IV, Membership.

ARTICLE V – DUES

See Retired Public Employees Council of Washington Constitution, Article VI, Finance.

ARTICLE VI – MEETINGS

Section 1. Chapters shall schedule chapter meetings to suit the needs of chapter members, but meetings shall be held not less than quarterly. The chapter meeting schedule for the next 12 months shall be made known to all members at the May meeting.

Section 2. The chapter president, a majority of the chapter executive board or a

petition signed by enough members to constitute a quorum may call a special meeting of the chapter.

Section 3. Chapter meetings will be conducted in accordance with this constitution.

Section 4. Ten members in good standing shall constitute a quorum for membership meetings.

ARTICLE VII – OFFICERS

Section 1. The minimum officers elected by each chapter will be a president, vice- president, secretary and treasurer or secretary-treasurer and three executive board members.

Section 2. These elected officers shall constitute a chapter executive board. Additional executive board members may be elected.

ARTICLE VIII – ELECTIONS

Section 1. Any chapter member in good standing shall be eligible to hold elective office and to vote in any chapter election.

Section 2. Nominations and elections of chapter officers shall be carried out by one of the following methods:

- A. Nominations at the March meeting, elections conducted by secret ballot at the April meeting and installation of officers at the conclusion of the April meeting.
- B. Nomination and election by secret ballot at the April meeting and installation of officers at the conclusion of the April meeting.

Section 3. Nominations and elections of officers shall be conducted at a duly called meeting of the chapter. At least fifteen (15) days advance notice of the nominations and elections shall be mailed to the members by the secretary.

Section 4. Nominations shall be called for from the floor. If only one (1) candidate is nominated, the presiding officer shall immediately declare said candidate elected by acclamation. If more than one (1) candidate is nominated for an office, an election by secret ballot must be held.

Section 5. A majority of all the votes cast shall be necessary to elect a candidate. When more than two (2) candidates are nominated for a single office, and none of them receives a majority of all votes cast, all candidates except the two (2) who received the most votes shall be dropped, and a second ballot shall be cast. When a secret ballot election is required, the ballots shall be maintained on file for a period of not less than one (1) year.

Section 6. Installation format shall be as follows: "I, _____, promise and pledge that I will perform faithfully and with honor the duties of the office, which I now assume in Chapter Number _____ of the Retired Public Employees Council and I will deliver to my successor in office all books, papers and other property of the chapter, which are in my possession at the close of my official term."

Section 7. The AFSCME Retiree Election Manual shall prevail at all chapter elections.

Section 8. Should a vacancy occur in any elected office, the executive board, by majority vote, shall elect a chapter member in good standing to fill the

unexpired term.

Section 9. If an officer misses three consecutive chapter meetings without an excuse acceptable to the executive board, the position will be considered vacant and filled in accordance with the above section.

Section 10. No funds of the chapter or council may be spent in campaigning for an elective office of the chapter or the council.

ARTICLE IX – DUTIES AND POWERS OF OFFICERS, EXECUTIVE BOARD

Section 1. President. The president shall preside at all meetings of the chapter and the executive board; shall appoint an election committee to supervise all elections and appoint all other committees not otherwise provided for in this constitution; shall be a member ex officio of all committees except the election committee; and shall co-sign any withdrawals against the funds of the chapter. At the conclusion of his/her term, the president shall deliver to his/her successor all books, papers and other property of the chapter, which are in his/her possession at the close of the official term.

Section 2. Vice-President. The vice-president shall assist in general work among the members to keep the organization active and shall assist the president in every way possible. In the absence or incapacity of the president, the vice-president shall assume the duties and powers of the president, including the co-signing of any check drawn on the chapter funds.

Section 3. Secretary. The secretary shall keep a record of the proceedings of the executive board and meetings of the chapter. The secretary shall record a roll call of all officers at each meeting, carry on the official correspondence of the chapter, except as the executive board may direct otherwise, and shall perform such other duties as the president shall require. In the event the president and the vice-president are not present at a meeting of the chapter, the secretary shall serve as presiding officer pro-temp.

Section 4. Treasurer. The treasurer shall keep an accurate record of all monies received and disbursements made by the chapter and shall render a financial report at each meeting of the chapter. The treasurer shall deposit all monies received to the credit of the chapter in a bank selected by the executive board; shall sign any withdrawals against the funds of the chapter and shall make arrangements with the bank so that the president, vice-president, or an alternate officer authorized by the executive board, shall co-sign any withdrawals against the funds of the chapter. Expenditures from the chapter's general fund shall be in conformance with procedures and guidelines adopted by the chapter executive board. The treasurer shall submit the chapter books and records for audit when required by the chapter or by the executive board of the Retired Public Employees Council of Washington. The chapter treasurer shall provide any information to the RPEC council office, which is necessary to obtain a surety bond.

If the chapter establishes the office of secretary-treasurer, that officer shall perform all duties outlined in Sections 3 and 4 of this Article.

Section 5. Executive Board Members-at-Large. The executive board members-at-large shall represent the wishes of the chapter membership on the executive board. They shall be entitled to vote on any matter coming before the executive board for action.

Section 6. Executive Board.

A. The executive board shall be the governing body of the chapter between

meetings of the chapter. All matters affecting the policies, aims and means of accomplishing the purposes of the chapter not specifically provided for in this constitution or by the action of the chapter shall be decided by the executive board, subject to the approval of the chapter at the next meeting. A report of actions taken by the executive board shall be made to the membership at the next meeting of the chapter.

- B. The executive board shall meet at the call of the president, or at such times as a majority of the members of the board shall call for a meeting. A majority of the members of the chapter executive board shall constitute a quorum for the transaction of business.

ARTICLE X – CONVENTION DELEGATES

See Retired Public Employees Council of Washington Constitution, Article V, Chapters, Section 13.

ARTICLE XI – RESOLUTIONS TO THE RETIRED PUBLIC EMPLOYEES COUNCIL CONVENTION

See Retired Public Employees Council of Washington Constitution, Article XII, Miscellaneous Provisions.

ARTICLE XII – AMENDMENTS TO THE RETIRED PUBLIC EMPLOYEES COUNCIL CONSTITUTION AND BY-LAWS

See Retired Public Employees Council of Washington Constitution, Article XI, Amendments to the Constitution and Bylaws.

ARTICLE XIII – FUNDS AND PROPERTY OF THE CHAPTER

Section 1. All money received shall be placed directly into an account which is insured by the Federal Deposit Insurance Corporation (FDIC), the Federal Savings and Loan Insurance Corporation (FSLIC), or the National Credit Union Administration (NCUA). The account must be in the name of the subordinate body, and no other money shall be placed in the account.

Section 2. The president and treasurer shall be authorized signatories on the chapter accounts; upon the approval of the executive board, the vice-president or alternate executive board member can be authorized to act as a co-signer of checks drawn on the chapter funds in place of either the president or the treasurer. All authorized expenditures shall be made by check, except for services authorized and provided by the RPEC. The RPEC may withhold payment for such services from the chapter per capita. Checks drawn on a chapter's account must be signed two signatories.

Section 3. The funds and property of the chapter shall remain intact for the use of the chapter for its legitimate purposes while ten (10) or more members remain therein. Whenever there are fewer than ten (10) members, or when the chapter realigns or its charter is revoked, the Retired Public Employees Council of Washington shall revert all funds, properties and assets of the chapter to the Retired Public Employees Council of Washington, so far as it is not inconsistent with the Retired Public Employees Council and the AFSCME International constitutions and the laws of the State of Washington.

ARTICLE XIV – AMENDMENTS TO THE CHAPTER CONSTITUTION

Section 1. This constitution may be amended by a majority vote of the members voting on such amendments at a meeting of the chapter, with the exception of the dues amount and disposition which is governed by the Retired Public Employees Council of Washington Constitution; PROVIDED: that such

amendments were submitted to all chapter members at least ten (10) days prior to the meeting at which the vote is taken.

Section 2. Any amendments to this chapter constitution and by-laws must be approved by the executive board of the Retired Public Employees Council of Washington.

Section 3. Nothing contained in Appendix A (chapter constitution) shall be in conflict with the council constitution. In all cases the Retired Public Employees Council of Washington Constitution shall prevail. Properly adopted amendments to the council constitution shall, where applicable, automatically be incorporated into Appendix A (chapter constitution).

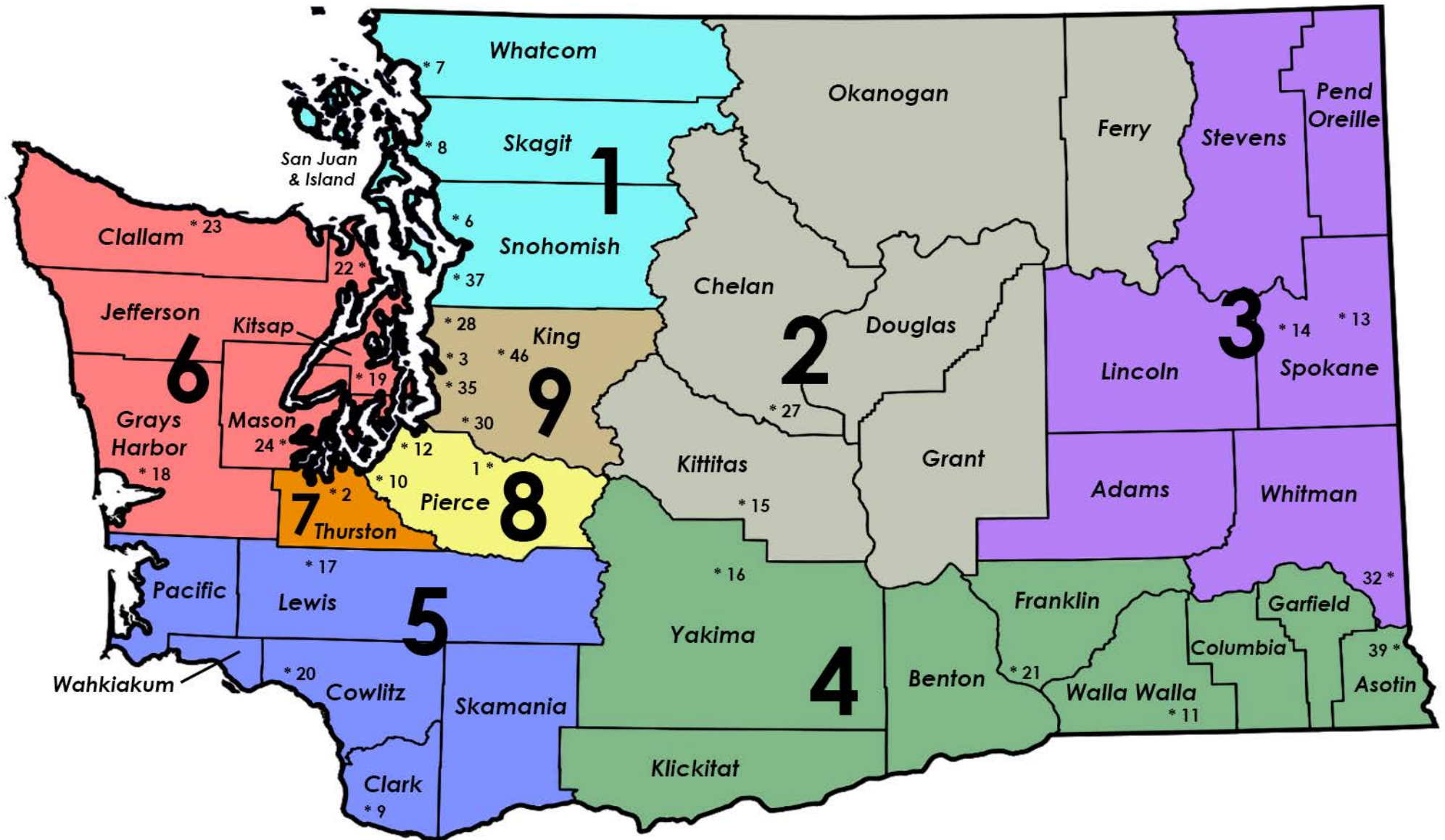
ARTICLE XV – MISCELLANEOUS PROVISIONS

Section 1. All questions of parliamentary nature not provided for in this constitution shall be decided by Robert's Rules of Order Newly Revised.

Section 2. Except to the extent specified in this constitution, no officer of the chapter shall have the power to act as agent for or otherwise bind the chapter in any way whatsoever. No member or group of members or other person or persons shall have the power to act on behalf of or otherwise bind the chapter except to the extent specifically authorized in writing by the president of the chapter or by the executive board of the chapter.

Section 3. This retiree chapter shall at all times be subject to the provisions of the constitution of the American Federation of State, County and Municipal Employees.

RPEC District Map

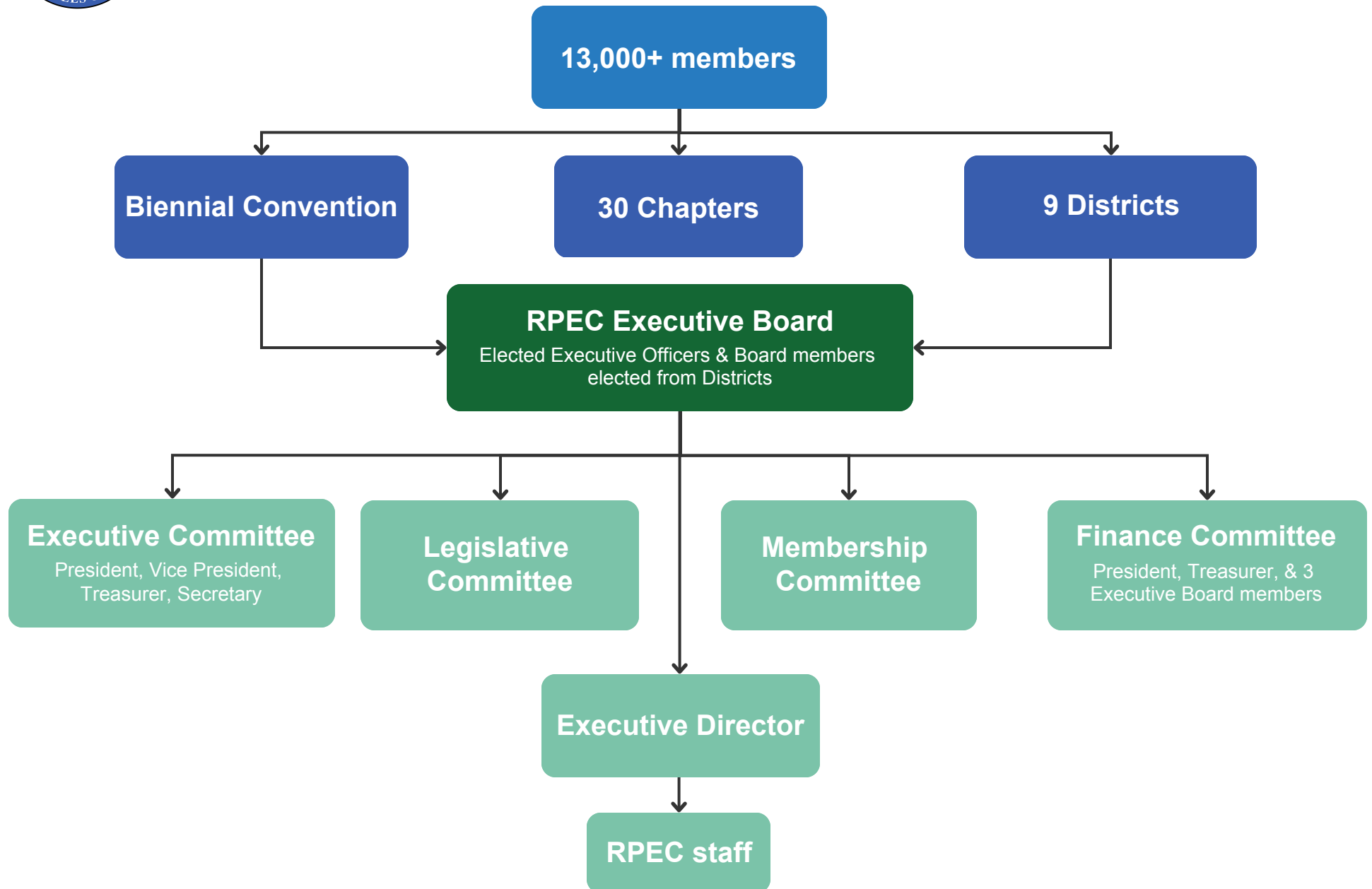




RETIREDC PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

AFSCME Retirees Chapter 10

Organizational Flowchart

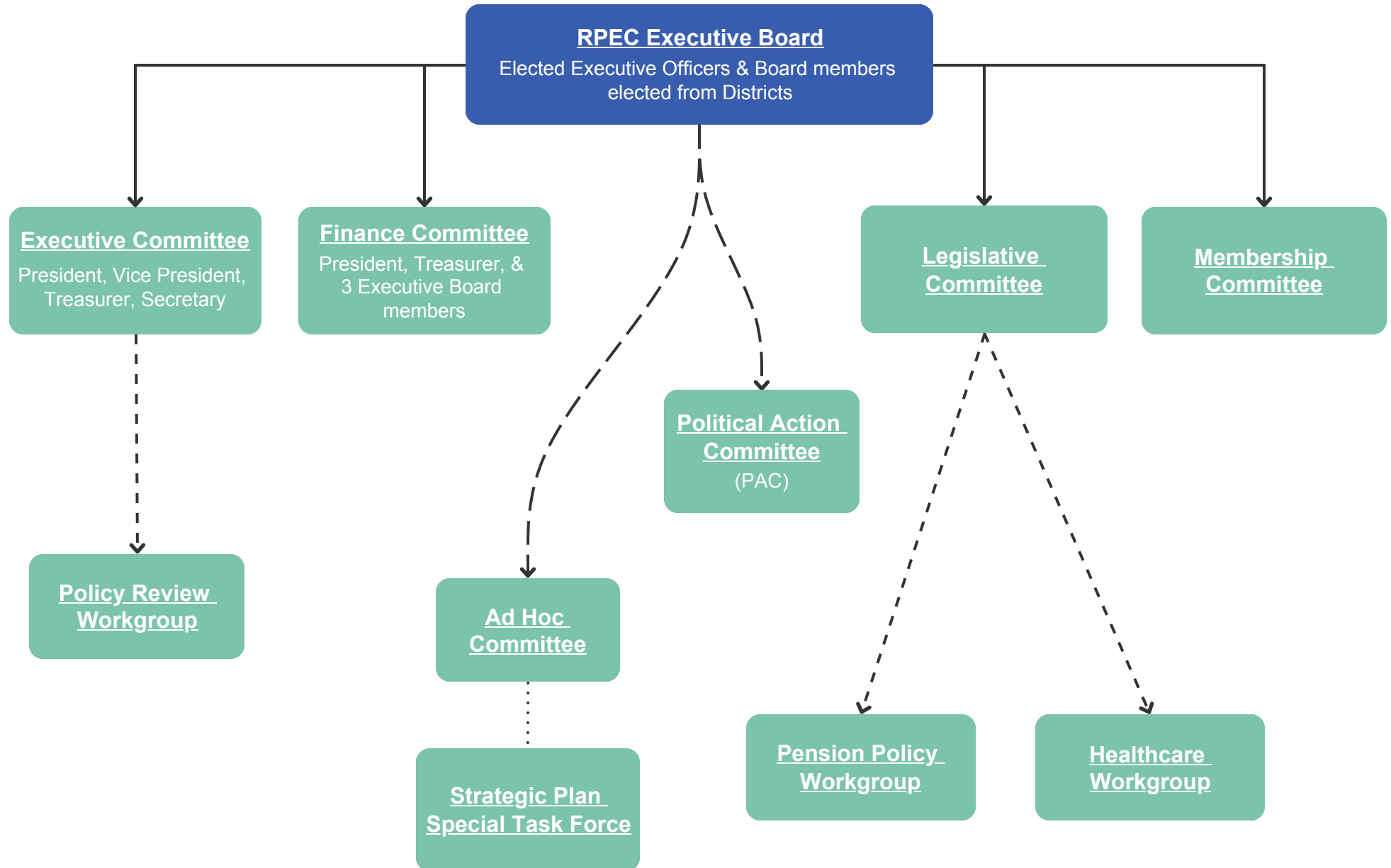




RETIREDCOUNCIL OF WASHINGTON

AFSCME Retirees Chapter 10

Organizational Flowchart





RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

2024-2026 RPEC Executive Board

OFFICERS – executivecommittee@rpecwa.org

PRESIDENT

Clair Olivers
Ch. 6
(425) 212-8816
clair@colivers.com

TREASURER

Jeff Paulsen
Ch. 2
(360) 701-1618
jeffpaulsen.17@gmail.com

VICE PRESIDENT

Maurice Garrott
Ch. 20
(360) 673-2022
cc911mo@aol.com

SECRETARY

Alma-jean Marion
Ch. 28
(206) 852-6868
alma-jean@comcast.net

DISTRICT BOARD MEMBERS – executiveboard@rpecwa.org

DISTRICT 1 – Ch. 6, 7, 8, & 37

Cheryl Moser
Ch. 7
(360) 201-8605
moserci@comcast.net

DISTRICT 3 – Ch. 13, 14, 32

Kandy Kraig
Ch. 13
(509) 868-8216
kkraigspok@comcast.net

DISTRICT 5 – Ch. 9, 17, 20

Penny Hall
Ch. 20
(360) 231-4461
pennyhall1@tds.net

DISTRICT 7 – Ch. 2

Katrina Wynkoop-Simmons
Ch. 2
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DISTRICT 9 – Ch. 3, 28, 30, 35, 46

Debbie Haigh
Ch. 30
(509) 688-9489
debbie14haigh@yahoo.com

DISTRICT 2 – Ch. 15, 27

Betty Rae Adams
Ch. 27
(509) 679-6007
shrinkingbetty@gmail.com

DISTRICT 4 – Ch. 11, 16, 21, 39

Steven Gamble
Ch. 21
(509) 586-7403
sgmgamble@charter.net

DISTRICT 6 – Ch. 18, 19, 22, 23, 24

Nancy Heley
Ch. 18
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naheley@comcast.net

DISTRICT 8 – Ch. 1, 10, 12

Paulette Thompson
Ch. 12
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pethompson457@gmail.com

DISTRICT 9 – Ch. 3, 28, 30, 35, 46

Claude Burfect
Ch. 3
(206) 719-0728
burfe2@gmail.com



RPEC Strategic Plan 2023-2027

Executive Board Unanimously Approves New Plan

At the November 2023 Executive Board meeting, the Board adopted the organization's new strategic plan – the first in more than five years. The plan is the culmination of nine months of research, evaluation, and planning. It outlines RPEC's overall direction and goals and will be used to guide decision-making and resource allocation. The plan will be implemented by the Board with support from local chapters and the Council Office. Strategic plans are dynamic, proprietary documents that are regularly evaluated and modified, based on data, feedback, emerging challenges, and opportunities.

STRATEGIC PLAN GOALS



Organizational Sustainability

To serve members, RPEC must be a stable and strong organization. This goal is designed to ensure RPEC is properly resourced to fulfill its mission.



Membership Recruitment

RPEC is fueled by the talents and time invested by members. This goal aims to broaden and strengthen RPEC's membership base.



Membership Retention & Engagement

RPEC wields considerable political clout due to its size and legislative advocacy. This goal aims to strengthen member retention and engagement.



Member Communications

RPEC offers valuable communication tools. This goal aims to expand RPEC's communications efforts to support recruitment, retention, engagement, and advocacy.



Federal Advocacy

Through increased member education, communications, and organizing, this goal aims to expand RPEC's work and influence in federal legislative advocacy.

How were the goals chosen?

The Executive Board leveraged national union resources to conduct a scientific telephone poll of members, administer an all-member written survey, and host an all-member virtual listening session to glean member insights. Member input from this research informed the goals.

How were members involved?

Members participated in the scientific telephone poll, the all-member written survey, and the virtual listening session. The perspective of chapter leaders was considered throughout the development process.

How will we implement the plan?

The strategic plan includes detailed annual action plans that outline the types of actions and efforts the Executive Board, chapters, and Council Office should undertake to achieve the goals. These annual plans, like the overall document, will be continually reviewed, evaluated, and modified, as needed, based on data and feedback.

Is the strategic plan a "public" document?

No. Strategic plans are internal documents that contain proprietary information. RPEC's strategic plan is a guiding document for the Executive Board. All chapter presidents have received a copy of the plan for their internal use.

You Play a Part in RPEC's Collective Success!

As a membership-driven organization, it is up to each of us to keep RPEC strong for future generations of public sector retirees. Over the next four years, you will have many opportunities to get involved in supporting RPEC's goals.



RPEC 2025-2026 LEGISLATIVE PRIORITIES

As approved by the RPEC Executive Board: 2/24/2025



TOP TIER PRIORITIES

Federal

- Work to protect and expand Social Security, Medicare, and Medicaid, and prevent privatization.
- Work to improve Medicare benefits, lower costs, and maintain and expand access to Vision, Dental, Hearing and other coverage gaps.
- Advocate for equal benefits between Medicare and Medicare Advantage plans.
- Work to pass legislation that eliminates the contribution cap to Social Security (\$168,600 in 2024) and adopts the CPI-E (consumer price index-elderly) to calculate the cost-of-living adjustments.

State

- Work to restore a permanent Plan 1 COLA. Adjust employer contribution rates to accommodate a permanent Plan 1 COLA like those available for Plans 2 and 3. Include the permanent Plan 1 COLA in the projected 2025/2027 biennium contribution rates.
- Be aggressive in maintaining and improving the financial integrity of the State retirement system:
 - Support full funding of employer contribution rates to pension plans.
 - Oppose efforts to create any new retirement plans for public employees that diminish benefit levels and/or compromise retirement security
 - Support only those modifications to retirement plans that do not threaten the financial integrity of the retirement system
- Continue efforts to strengthen the role of active and retired DRS members in DRS governance.
- Work to ensure all public sector retirees statewide have access to quality, affordable healthcare and the information necessary to choose the best plans for their particular needs.
- Ensure comprehensive, affordable Public Employees' Benefits Board (PEBB) self-insured Medicare benefits by increasing the state's contribution to premiums.
- Support legislation that would propose an amendment to the Constitution of the State of Washington – through the mechanism of the State Legislature to ensure the integrity of public pensions as enforceable contracts.

FEDERAL PRIORITIES

Social Security and Medicare

- Advocate for fair premiums for Medicare coverage.
- Support a Federal Government sponsored Universal Health Care Program.
- Support the full implementation of the Older Americans Act.
- Pursue affordable long-term care options for retirees.
- Work with the Center for Medicare & Medicaid Services to lessen claim denials with commercial Medicare Advantage (MA) plans and eliminate fraud.
- Oppose any deferment, reduction or elimination of the payroll taxes that fund Social Security and Medicare.
- Support legislation to revise the federal tax code to reflect progressive taxation, relieving the current tax burden on low- and middle-income persons and creating a fair-share tax for corporations.

STATE PRIORITIES

Retirement

- Work to expand access to the Minimum Retirement Benefit for Plan 1 PERS & TRS retirees who are over the age of 65 through a change to current legislation.
- Advocate for retirement security, particularly defined benefit-style pensions for all Washingtonians.
- Advocate for legislation that improves access to affordable housing.
- Advocate for correcting the regressive nature of Washington's tax code.

Health Care

- Support and monitor the Office of the Insurance Commissioner (OIC) in its regulation of Medicare supplement policies and rates to ensure quality, affordable plans. Advocate for the OIC to have a non-voting seat on PEBB.
- Support and monitor the Public Employees Benefits Board (PEBB) and Health Care Authority (HCA) to ensure quality, affordable plans, and to maintain availability of at least one self-insured retiree plan. Work to increase the state's contribution to PEBB plans.
- Work to ensure an RPEC member continues to serve as a voting member on PEBB or any future board that replaces it.

Contracting Out/Privatization

- Oppose efforts to privatize or contract out public services.

RPEC ADMINISTRATIVE ACTION

- Continue to encourage RPEC member-volunteers to advance RPEC's legislative agenda, to support lobbying activities year around, and to create relationships with their legislators.
- Continue to expand coalitions with other groups and seek stakeholder input in all areas of RPEC policy development.



Retired Public Employees Council of Washington

2025-2026 Committees & Workgroups

Executive Committee – executivecommittee@rpecwa.org

Clair Olivers, President, Chair

Jeff Paulsen, Treasurer

Maurice Garrott, Vice President

Alma-jean Marion, Secretary

Finance Committee – finance@rpecwa.org

Jeff Paulsen, Treasurer, Chair

Steven Gamble, Dist. 4

Clair Olivers, President

Penny Hall, Dist. 5

Cheryl Moser, Dist. 1

Legislative Committee – legislative@rpecwa.org

Dave Koenig, Ch. 11, Chair

Nancy Heley, Dist. 6

Martin Rollins, Ch. 2

Melinda Sommerlund, Ch. 21

Steve Segall, Ch. 2

Susan Gimlin, Ch. 21

Aruna Bhuta, Ch. 13

Jim Bals, Ch. 28

Elyette Weinstein, Ch. 18

Kevin Kiernan, Ch. 35

Membership Committee – membership@rpecwa.org

Maurice Garrott, Vice President, Chair

Susan Leschinski, Ch. 21

Sarah Wilson, Ch. 2

Debbie Haigh, Dist. 9

Colleen McGinn, Ch. 3

Wilhelmina Daniel, Ch. 30

Arlane Olson, Ch. 7

Andrea Torland, Ch. 35

Elayne Stodola, Ch. 19

Anita Eakers, Ch. 35

Political Action Committee – pac@rpecwa.org

Bev Hermanson, Ch. 2, Chair

Ed Cote, Ch. 9

Maurice Garrott, Vice President

Steve Kirby, Ch. 12

Steven Gamble, Dist. 4

Mike Marston, Ch. 22

Nancy Heley, Dist. 6

Julianne Moore, Ch. 16

Claude Burfect, Dist. 9

Susan Leschinski, Ch. 21

Mark Brown, Ch. 2

Adrienne Fraley-Monillas, Ch. 37

Joel Hall, Ch. 7

Ad Hoc Committee – adhoc@rpecwa.org

Maurice Garrott, Vice President, Chair
Cheryl Moser, Dist. 1
Kandy Kraig, Dist. 3

Katrina Wynkoop-Simmons, Dist. 7
Claude Burfect, Dist. 9

Strategic Plan Special Task Force – sptaskforce@rpecwa.org

Martin Rollins, Ch. 2
Susan Herring, Ch. 2
Bonnie Jacques, Ch. 2
Kent Questad, Ch. 3
Judy Kuschel, Ch. 9
Robert Devlin, Ch. 10
Barry Jenkins, Ch. 11
Cindy Hall, Ch. 13

Judy DeVoe, Ch. 20
Susan Leschinski, Ch. 21
Amy Fortier, Ch. 23
Jim Bals, Ch. 28
Bill Ziegler, Ch. 35
Bill Dehmer, Ch. 37
Klaire Harry, Ch. 37
Nick Fiore, Ch. 39

Healthcare Workgroup – hcw@rpecwa.org

Matt Groshong, Ch. 3, Chair
Betty Rae Adams, Dist. 2
Toni Long, Ch. 3
Judy Finn, Ch. 3
Ed Rodriguez, Ch. 3
Kent Questad, Ch. 3

Pam Somers, Ch. 6
Aruna Bhuta, Ch. 13
Christine Clark, Ch. 13
Elyette Weinstein, Ch. 18
Susan Leschinski, Ch. 21
Linnea Mulder, Ch. 46

Pension Policy Workgroup – ppw@rpecwa.org

Warren Warfield, Ch. 46, Chair
Debby Lippincott, Ch. 6
Gail Spaeth, Ch. 13

Linda Jorza, Ch. 30
Diane Yates, Ch. 35
Linda Nelsen, Ch. 35

Policy Review Workgroup – prw@rpecwa.org

Maurice Garrott, Vice President
Paulette Thompson, Dist. 8
Debbie Haigh, Dist. 9



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Council Office Contact Info. & Frequently Called Numbers

Council Office

906 Columbia Street SW, Ste. 501
Olympia, WA 98501

Phone: (360) 352-8262 / (800) 562-6097

Email: info@rpecwa.org

Website: www.rpecwa.org

Facebook: www.facebook.com/rpecwa

Professional Team

Laurie Weidner, Executive Director

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Ext. 101

Derek VanSpoor, Associate Director

derek.vanspoor@rpecwa.org

Ext. 104

Jane Hewitt, Finance & Operations Specialist

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Ext. 102

Alissa Brady, Project Coordinator

alissa.brady@rpecwa.org

Ext. 103

Jakob Canup, Membership Coordinator

jakob.canup@rpecwa.org

Ext. 106

Frequently Called Numbers

Department of Retirement Systems (DRS)

<http://wa.gov/DRS>

(360) 664-7000

AFSCME Council 2 (Headquarters)

<https://www.afscme.org/local/washington>

(425) 303-8818

Health Care Authority (HCA)

<https://www.hca.wa.gov/>

(844) 461-4436

Washington Federation of State Employees

(WFSE)

<https://www.wfse.org/>

(833) 622-9373

Public Employees Benefits Board (PEBB)

(360) 725-0440 / (1-800) 200-1004

Statewide Health Insurance Benefits Advisors

(SHIBA)

(1-800) 562-6900

2. Policies, Forms & Procedures



Retired Public Employees Council of Washington

ROLES AND RESPONSIBILITIES FOR MEMBERSHIP RECRUITMENT AND RETENTION

1. **State Executive Board:** The State Executive Board has the overall responsibility for leadership on growth and retention of members, establishing membership development policies and developing the guidelines governing the duties and responsibilities of the State Membership Committee (Committee). The Executive Board will consider the recommendations of the Committee, adopt the membership goals and objectives for the coming year and will help to implement member recruitment and retention plans.
2. **President:** The President is responsible for oversight on meeting the Retired Public Employees Council of Washington (RPEC) goals and objectives which include the planning, implementing, and monitoring of the RPEC membership program developed and implemented by the State Membership Committee. The membership program is coordinated by the Chair of the State Membership Committee in conjunction with RPEC's Membership Coordinator and Executive Director.
3. **State Membership Committee:** The Committee is appointed by the President, subject to the approval of the Executive Board, and composed of a chair and members from various geographic areas of the state. The chair schedules Committee meetings, prepares the agenda, facilitates the meetings, guides the Committee's work, and provides reports to the President and Executive Board at each Executive Board meeting.

The Committee, in conjunction with the Membership Coordinator and Executive Director, plans and recommends to the President and Executive Board, at least annually, strategies for the implementation of the membership recruitment/retention program.

The Committee's responsibilities are to:

- (a) Provide guidance and support to the Executive Board, chapters and chapter membership chairs on accomplishing RPEC's membership recruitment and retention goals and objectives. Committee members will communicate and coordinate with District Representatives, chapter leaders and chapter membership chairs (in their district) to accomplish RPEC's membership recruitment and retention goals and objectives.
- (b) Develop, recommend, and implement a statewide recruitment and retention program that includes recruitment, retention, and the reactivation of lapsed RPEC members. Elements of the recruitment and retention program, to be developed and implemented by the State Membership Committee, may include, but are not limited to:
 - Developing recruitment mailings;
 - Leading phone calling eligible retirees;
 - Developing and leading recruitment and retention workshops;
 - Developing, initiating, and leading statewide, district or chapter training on membership recruitment and retention;
 - Developing and leading statewide or local membership drives;
 - Creating recruitment and training materials;
 - Reviewing the membership handbook, as needed, but at least on a biennial basis.
 - Building relationships with other organizations for recruitment of members;
 - Developing and implementing a recognition program on achievements of individuals and chapters in membership recruitment and retention;

- Monitoring chapter health;
 - Developing and implementing strategies with District Representatives to support at-risk chapters;
 - Building and supporting functioning chapters in collaboration with District Representatives; and
 - Building on communications for the purpose of educating and informing RPEC members and encouraging member participation in RPEC activities.
- (c) Report on the Committee's activities and the membership recruitment and retention program at each Executive Board meeting.
- (d) Provide input and feedback, as needed, on Council communications regarding membership recruitment and retention.

4. Chapter Presidents: The chapter presidents and the local executive board, in conjunction with their local membership committee or membership chair, will adopt a membership recruitment and retention program for their chapter that aligns with RPEC's organizational goals. The chapter president, in conjunction with its membership committee or chair, will review and/or update its recruitment and retention program as needed, but at least once a biennium. This plan will be shared with the District Representative(s) on a biennial basis.

5. Chapter Membership Committees: The chapter membership committee is central to the entire organizing effort. Although the Council conducts statewide membership drives, chapters are responsible for local recruitment and retention efforts.

The chapter membership committee should include at least the chapter membership committee chair and one member at large. Their duties include:

- Contacting newly retired persons and maintaining records on their contacts;
- Tracking attendance at monthly meetings and sharing updated member contact information with the RPEC Membership Coordinator;
- Implementing a process for contacting members, on a periodic basis, to strengthen engagement and local advocacy;
- Tracking and monitoring the effectiveness of chapter recruitment and retention efforts and to identify where more or different kinds of work are needed to achieve annual goals.

6. RPEC Membership Coordinator: The Membership Coordinator is the staff liaison to the State Membership Committee. The Membership Coordinator develops and coordinates statewide recruitment and retention efforts and supports the State Membership Committee in implementing its outreach, retention, and engagement plans. The Membership Coordinator maintains membership records and reports membership information to the Executive Board through the Council Office report.

The Membership Coordinator is the point person on the production of large and small chapter newsletters and coordinates digital chapter newsletter distribution. The Membership Coordinator and the Executive Director are RPEC's liaisons to labor organizations regarding new member recruitment and gifted programs.

The Membership Coordinator develops and delivers workshops and programming for new and potential members and creates communications tools that underscore the value of membership. The Membership Coordinator supports other Member Communication and marketing efforts under the direction of RPEC's Associate Director. The Membership Coordinator also develops and creates programming to support chapter officers in strengthening local/chapter member recruitment and retention plans.

Approved by Membership Committee on 4/25/2024.
Approved by Executive Board on 5/6/2024.



Retired Public Employees Council of Washington

LEGISLATIVE COMMITTEE DUTIES AND RESPONSIBILITIES

Updated by the RPEC Legislative Committee: 12/6/2024

Approved by the RPEC Executive Board: 2/24/2025

1. PURPOSE

The purpose of the Committee is to help the RPEC Executive Board develop and promote the legislative goals of the organization at the state and national levels.

2. APPOINTMENT

The committee shall be appointed by the President, subject to the approval of the Executive Board, preferably with appointees from each RPEC District. Appointments will run from the date of Executive Board approval to the next convention.

3. MEETINGS

BEFORE CONVENTION, meet to develop a proposed legislative agenda to be submitted to the Executive Board and Convention for consideration.

BEFORE THE LEGISLATIVE SESSION, meet to prioritize legislative agenda and develop a strategy to advance the agenda.

DURING THE LEGISLATIVE SESSION, the committee will meet as needed to assist in carrying out the legislative plan, including communicating with legislators at Legislative Day and/or other activities.

AFTER THE LEGISLATIVE SESSION the committee will meet to evaluate the legislative session and suggest priorities for the next legislative session.

DURING THE YEAR the committee chair will report on the committee's work at the Executive Board meetings.

4. GENERAL ACTIVITIES

- A. Assist the Executive Director and Lobbyist with proposing and drafting legislation.
- B. Encourage chapters to establish long-term relationships with local legislators.
- C. Emphasize member-based political programs to help build the organization.
- D. Develop position papers/resolutions to present to the Executive Board and Convention Legislative Committee.
- E. Regularly review the status of previously passed resolutions and provide recommendations to the Executive Board on resolutions to be proposed to delegates at the biennial Conventions.

- F. Develop a quick response team that can knowledgeably testify, call, or write their legislators when needed.
- G. Encourage members to participate in and contribute to the RPEC Political Action Committee fund and/or AFSCME PEOPLE (Public Employees Organized to Promote Legislative Equality) program by educating members on its importance.
- H. Coordinate legislative activities with the Executive Director and Lobbyist. Facilitate communication with members about actions needed regarding legislation on an on-going basis. Share information with chapter members at chapter meetings and encourage chapter leadership to support Council advocacy efforts with emails, etc.
- I. Assist in planning and organizing Lobby Day.
- J. Provide direction and assistance to Executive Director and Lobbyist on advancing agenda.
- K. After each legislative session, recommend to the RPEC Executive Board one or more legislators to receive the RPEC Legislative Champion Award. The committee may also recommend that no award be given.
- L. Support and provide guidance to RPEC's Healthcare Workgroup and Pension Policy Workgroup.



Retired Public Employees Council of Washington

POLITICAL ACTION COMMITTEE POLICIES AND PROCEDURES

1. PURPOSE

The Retired Public Employees Council Political Action Committee (PAC) is established to meet in each election cycle to accept endorsement recommendations from chapters and determine:

- A) Legislative candidates to be endorsed by RPEC.
- B) Contribution amounts for these endorsed candidates.
- C) Other expenditures to support RPEC's political strategy, including contributions to political committees and independent expenditures directed to members.
- D) PAC fundraising mailings and expenditures.
- E) Recommendations to the RPEC Executive Board on statewide and congressional matters.

2. COMPOSITION OF COMMITTEE

- A) The RPEC-PAC will consist of no more than 13 members: 12 members plus the President. The Executive Director shall be a non-voting ex-officio member of the RPEC-PAC.
- B) Up to four (4) members of the PAC will be RPEC Executive Board members appointed by the President.
- C) Not more than Nine (9) members will be non-Board members appointed by the President.
- D) All members will serve a two-year term. To ensure continuity throughout election cycles, terms will begin and end on the November general election date of even numbered years.

3. GENERAL POLICIES

- A) The RPEC-PAC will endorse and make campaign contributions to candidates for state legislature. The RPEC-PAC will consider chapter input, when available, when making endorsement decisions. RPEC members are welcome and encouraged to attend meetings of the committee to provide feedback and recommendations. See Section 8, RPEC-PAC ENDORSEMENT AND CONTRIBUTION CRITERIA. The RPEC-PAC may contribute PAC funds to statewide and local political committees. The RPEC-PAC may approve and allocate funds to independent expenditures targeting members in key legislative districts. The RPEC-PAC will approve and allocate funds of up to \$10,000 per year to PAC fundraising mailings to members.
- B) The RPEC Executive Board will make endorsements in federal and statewide races and make contributions to statewide candidates. No RPEC entity will endorse a candidate for US President or make campaign contributions in federal races. The Board will also decide on any statewide ballot measures to support and contributions to make to these issue campaigns as well. When the RPEC-PAC meets, they may make recommendations to the

Board regarding any federal or statewide candidates or statewide ballot measures for the Board to consider when making decisions.

- C) Individual chapters may arrange to make contributions from their own treasury to the RPEC-PAC which they earmark for a particular local, legislative, or statewide candidate, statewide or local ballot measure, or local political committee provided that there is no conflict between the action requested by the chapter and any decision made by the RPEC-PAC. The PAC will then forward the contribution to the candidate or ballot measure with a cover sheet giving the chapter credit for the contribution. All contributions will be made through the RPEC-PAC in order to ensure that all Public Disclosure Commission (PDC) limits are not exceeded and that campaign financing rules are followed. Chapters may also make general non-earmarked contributions of chapter funds to the RPEC-PAC.
- D) Individual chapters cannot make endorsements of statewide or legislative candidates or statewide ballot measures.
- E) Individual chapters cannot contribute directly to any candidates or ballot measures.
- F) Individual chapters can make endorsements of candidates in local races and local ballot measures.
- G) No member will represent RPEC in any way on any legislation or issue in opposition to the stated goals and objectives of RPEC.
- H) No individual, chapter, or groups of chapters will publish or distribute political information or material under the RPEC letterhead.
- I) The Executive Director will submit an annual "report card" of legislators' voting records regarding RPEC issues via the RPEC newsletter to the membership and to the RPEC-PAC for inclusion in the annual report.

4. INTERVIEWS AND CONTRIBUTIONS

- A) Candidate interviews can begin in the spring of an election year, although it is often necessary to wait until after the filing period for candidacy ends. The committee may also prepare a questionnaire to be sent to candidates.
 - 1) Method: Interviews regarding endorsement action will be conducted on a formal basis, coordinated by chapters in communication with the RPEC office. Chapters with members within the legislative district are to collaborate and send members to participate in the candidate interview process. The RPEC office will supply the questions. Questions should not be shared with candidates in advance of the interview.
 - 2) Location: Interviews may be conducted in-person or virtually.
 - 3) Report of Interview: The member interview committee should recommend endorsement action(s) for the RPEC-PAC relating to the interviewed candidates. A report by RPEC member interview committee will be made to the chair of RPEC-PAC within seven (7) days of the interview. RPEC-PAC will then inform the candidates and relevant chapters of any endorsement actions taken.

- B) Tickets to Campaign Fund-raising Events: When invitations to events such as fundraisers are received with too short a response time to poll the PAC members as to the amount to be donated, up to \$1200 for a single occasion may be authorized by the President, based on the recommendation of the Executive Director. A full accounting will be presented to the RPEC-PAC at the end of the month in which expenditures are made in this matter.
- C) Mailings: Political mailings must be initiated through the RPEC office so reports can be made to PDC of in-kind contributions. The membership mailing list will not be given to anyone.

5. OTHER ACTIVITIES

Chapters should develop and maintain an active chapter political action program which includes participating in candidate interviews and identifying members to assist endorsed candidates during campaigns. Campaign efforts will be coordinated through the RPEC Office. Chapter leaders are also encouraged to represent RPEC at fundraisers hosted by candidates that RPEC has endorsed and contributed money to.

6. GENERAL OPERATING PROCEDURES

- A) Assessments, recommendations and decisions must be done as early as possible in an election year.
- B) The RPEC-PAC will incorporate chapter input into its decisions, using information gathered from chapter political action committee and candidate reports, voting records and public statements by the candidates.
- C) The RPEC-PAC will meet at least twice per year.
- D) RPEC-PAC expenses will be paid from RPEC-PAC funds.
- E) A report of activities by RPEC-PAC will be presented to the Executive Board.
- F) A report will be presented to the convention.
- G) Electronic polls of the committee may be used to make endorsement and contribution decisions.

7. SUPERSESSION CLAUSE

This policy supersedes and replaces all previous versions of RPEC-PAC Policies and Procedures and By-Laws of this Committee.

8. RPEC-PAC ENDORSEMENT AND CONTRIBUTION CRITERIA

Early Endorsements:

- Made before or after the filing deadline.
- Incumbents with positive records on RPEC issues running for reelection are eligible.
- Challengers who have previously been endorsed may be considered as well.

Endorsement Interviews/Questionnaire:

- After filing deadline.
- For new candidates, challengers to incumbents who are not early endorsed, those who are new to the Legislature, and incumbents who have not previously been endorsed.
- Questionnaire sent to candidates; interviews as follow up if necessary.
- Interviews are scheduled by chapter leaders in district or coordinated by WFSE with leaders invited to sit in and ask questions. Chapters with 10 or more members in district are invited to participate.
- Recommendations from Chapter leaders passed on to PAC for deliberation.

Priority Races:

- After the primary election.
- Chair works with Executive Director and Lobbyist to create list of recommended priority races for contributions and endorsement mailings to members using criteria below.
- Recommendations presented to the PAC for deliberation.

Criteria Consideration of Contributions:

- What is the candidate's record of sponsoring, voting, and promoting RPEC priorities?
- How did the candidate perform on the questionnaire and/or the interview?
- How does the candidate shape the balance of power in the legislature?
- How much power does the candidate have relative to other legislators and candidates?
- How much impact would a campaign contribution make on an election's outcome?

Last Revision Date 1/16/2025

Approved by Executive Committee 2/5/2025

Approved by Executive Board 2/24/2025



Retired Public Employees Council of Washington

PENSION POLICY WORKGROUP GUIDELINES & RESPONSIBILITIES

Purpose:

The Pension Policy Workgroup supports RPEC's efforts to establish a permanent, annual cost of living adjustment for Plan 1 retirees, and protect and enhance all pension plans overseen by the Washington State Department of Retirement Systems.

The purpose of the workgroup is to research pension-related issues impacting RPEC members vested in Plans 1, 2 and 3, and to share insights, information, and recommendations to help inform effective policy decisions by the RPEC Legislative Committee.

Appointment:

The workgroup shall be appointed by the President, subject to the approval of the Executive Board. The workgroup shall have at least one member of the RPEC Executive Committee as a member. When vacancies occur, if the workgroup chair wants to fill the vacant spot(s), he/she/they may recommend one or more choices for appointment to the Legislative Committee chair. The Legislative Committee chair will then make a recommendation to the President. Once an appointee(s) is identified by the President, the appointee(s) will be confirmed by the Executive Board.

Governance:

The workgroup shall serve from the time of appointment approval of the Executive Board through the next RPEC Convention. The workgroup shall report to the RPEC Legislative Committee.

- Efforts undertaken by individual workgroup members and/or the collective body will be at the direction of the workgroup chairperson.
- The workgroup chairperson is the spokesperson for the workgroup, and the liaison with the Legislative Committee.
- Following Roberts Rules, motions on the suggested policy matters will be made by vote of a quorum of the appointed Pension Policy Workgroup members. All motions will be provided in writing with supporting documentation (PDFs of the bills, bill summaries, etc.) to the Legislative Committee for consideration. Written motions and recommendations must be provided to the Executive Director (and/or staff appointee) and Legislative Committee Chairperson at least 10 days prior to Legislative Committee meetings, when possible, for inclusion in the agenda and mailed packet. When circumstances prevent this lead time, the Committee may also receive motions and supporting documentation via email with a 48-hour lead time.

General Activities:

1. Monitor the pension landscape in Washington and nationally through ongoing research and information sharing.
2. Communicate timely findings and information to the RPEC Legislative Committee Chair, RPEC President and Executive Director to enable RPEC to respond proactively to threats that could impact the pension security of RPEC members.

3. Monitor and attend the virtual Select Committee on Pension Policy (SCPP) and the Pension Funding Council (PFC) meetings.
4. Support Council Office-driven member mobilization efforts that promote pension security for all RPEC members.
5. Make policy recommendations in writing with supporting documentation to the RPEC Legislative Committee to help inform legislative action before, during and after the legislative session.
 - a. All recommendations shall be made in writing with supporting documentation to the RPEC Legislative Committee.
6. Document workgroup meetings through a workgroup appointed note taker. Provide meeting notes to the Legislative Committee Chair for review prior to forwarding to the Council. The Council Office shall receive a cc: copy.
7. Working with the Council Office, create an information archive to support future Pension Policy Workgroups in addressing emerging issues supporting the RPEC's legislative priorities document.
8. At the discretion of the chair of the RPEC Legislative Committee, provide status reports to the general membership about the workgroup's actions and priorities.

Approved by Pension Policy Workgroup: 2/1/2024

Approved by Legislative Committee: 3/15/2024

Approved by Executive Committee: 4/8/2024

Approved by Executive Board: 5/6/2024



Retired Public Employees Council of Washington

HEALTHCARE WORKGROUP GUIDELINES & RESPONSIBILITIES

PURPOSE:

The Healthcare Workgroup supports RPEC's efforts to protect and improve Medicare and health care insurance benefits for retired public employees.

The purpose of the workgroup is to support RPEC's healthcare related policy priorities as outlined in RPEC's legislative priorities document.

APPOINTMENT:

The workgroup shall be appointed by the President, subject to the approval of the Executive Board. The workgroup shall have at least one member of the RPEC Executive Committee as a member. When vacancies occur, if the workgroup chair wants to fill the vacant spot(s), he/she/they may recommend one or more choices for appointment to the Legislative Committee chair. The Legislative Committee chair will then make a recommendation to the President. Once an appointee(s) is identified by the President, the appointee(s) will be confirmed by the Executive Board.

GOVERNANCE:

The workgroup shall report to the RPEC Legislative Committee on matters pertaining to state and federal legislation. In some instances, the workgroup will be tasked with duties which fall outside of the scope of responsibility of the Legislative Committee. In these instances, the workgroup will keep the Executive Director and Executive Committee apprised to help inform RPEC action and healthcare priorities.

- Efforts undertaken by individual workgroup members and/or the collective body will be at the direction of the workgroup chairperson.
- The workgroup chairperson is the spokesperson for the workgroup, and the liaison with the Legislative Committee.
- Following Roberts Rules, motions on the suggested positions on bills and policy matters will be made by vote of a quorum of the appointed Healthcare Workgroup members. All motions will be provided in writing with supporting documentation (PDFs of the bills, bill summaries, etc.) to the Legislative Committee for consideration. Written motions and recommendations must be provided to the Executive Director (and/or staff designee) and Legislative Committee Chairperson at least 10 days prior to Legislative Committee meetings, when possible, for inclusion in the agenda and mailed packet. When circumstances prevent this lead time, the Committee may also receive motions and supporting documentation via email with a 48-hour lead time.

GENERAL ACTIVITIES:

1. Monitor the health care landscape in Washington and nationally through ongoing research and information sharing.
2. Research issues, federal legislation, and federal agency efforts that could destabilize Medicare.
3. Communicate timely findings and information to the RPEC Legislative Committee Chair, RPEC President and Executive Director to enable RPEC to respond proactively to threats that could impact the health care security of RPEC members.
4. Monitor and attend the virtual meetings of the Public Employees Benefits Board (PEBB).
5. Keep apprised of issues impacting health care security through the Office of the Insurance Commissioner.
6. Support Council Office-driven member mobilization efforts that promote health care security for all RPEC members.
7. Make recommendations, in writing with supporting documentation, to the RPEC Legislative Committee to help inform legislative action before, during and after the legislative session.
 - All recommendations shall be made in writing with supporting documentation to the RPEC Legislative Committee.
8. Document workgroup meetings through a workgroup appointed note taker. Provide the notes to the Council Office and Legislative Committee Chairperson for review by the RPEC Legislative Committee.
9. Working with the Council Office, create an information archive to support future Healthcare Workgroups in addressing emerging issues supporting the RPEC's Legislative Priorities document.
10. At the discretion of the chair of the RPEC Legislative Committee, provide status reports to the general membership about the workgroup's priorities and actions.

Approved by the Healthcare Workgroup: 4/11/2024

Approved by the Legislative Committee: 7/12/2024

Approved by the Executive Committee: 7/19/2024

Approved by the Executive Board: 8/19/2024



RPEC Executive Board Meeting Processes & Norms



Adopted by the RPEC Executive Board on November 19th, 2024

Processes:

How RPEC activities and goals will be carried out by the Executive Board.

1. Use Robert's Rules of Order.
2. Ask questions that lead to effective decision-making.
3. Stay on task/agenda and refer tangential items to the Parking Lot for later discussion under Good of the Order.
4. Per RPEC's Convention guidelines, pro/con remarks relating to a motion will be limited to 2-3 minutes per speaker.
5. Refrain from restating what has already been said.
6. Come prepared. Review meeting materials ahead of time.
7. Use brainstorming on new or challenging issues.
8. Ask for any questions or issues that haven't been heard.
9. Find ways to get feedback from those impacted by a decision.
10. Use microphones.

Norms:

Ways in which RPEC Board members will interact with each other.

1. Before you speak, think – is it true? Is it helpful? Is it inspiring? Is it necessary? Is it kind?
2. Be respectful to each other.
3. Be positive/speak with care.
4. Frame remarks in a constructive manner without calling out individuals.
5. Listen to others when they speak.
6. Refrain from dominating the discussion to allow all to contribute.

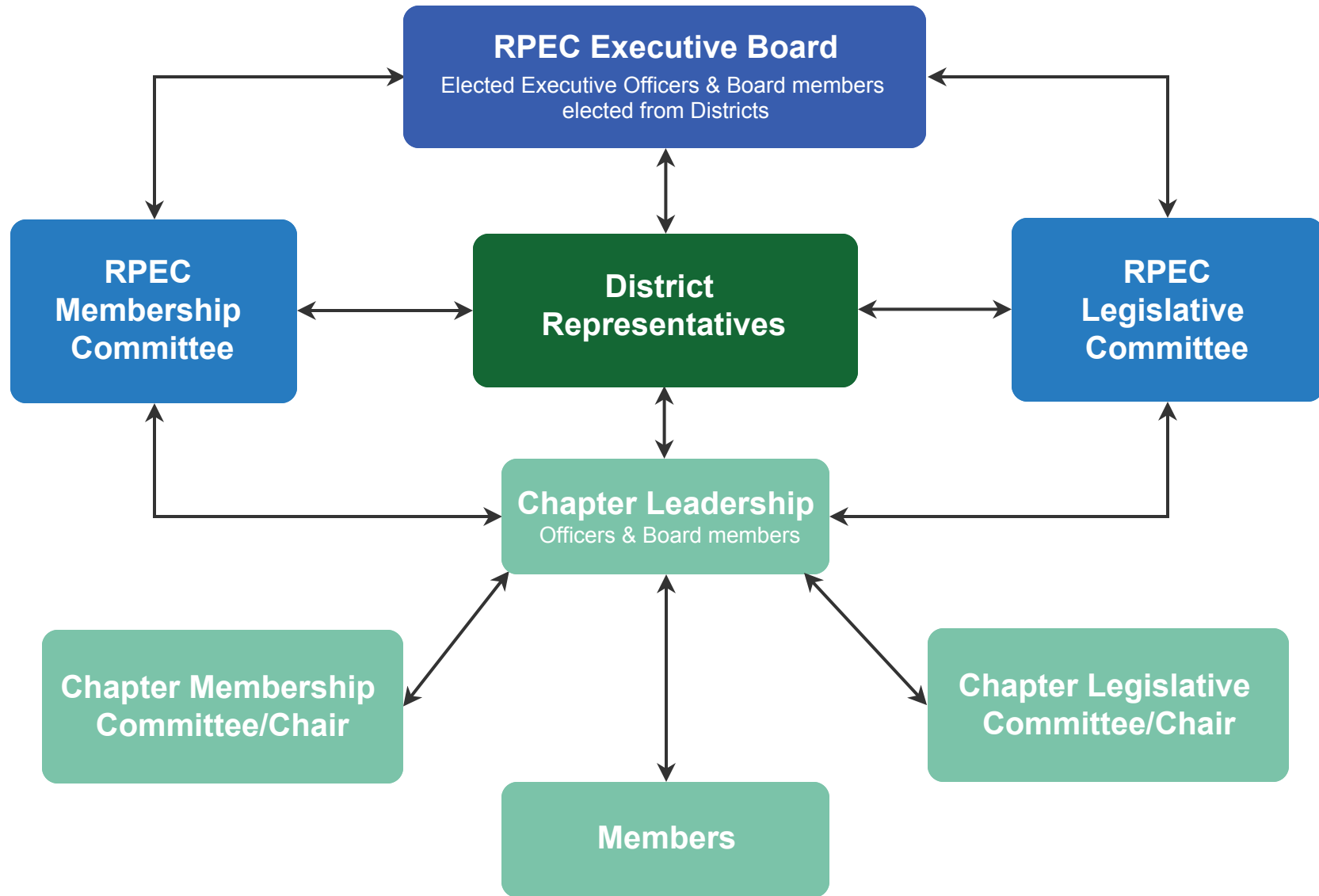
Other Best Practices:

1. Make space for all voices.
2. Be fully present.
3. Arrive on time and return on time from breaks.



RETIREED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Effective Communications Network for Organizational & Chapter Sustainability.



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Chapter Minimum Allocation Policy

INTRODUCTION

Each active RPEC chapter should receive a minimum allocation of monthly dues.

PURPOSE

- Establishes a monthly minimum allocation of dues that every chapter should receive, to support basic chapter operations.
- Requires semi-annually completion and filing of Chapter Minimum Allocation Financial Report by chapters who receive a minimum allocation.

SCOPE

- Chapters whose portion of member monthly dues is less than \$100.
- Chapter Minimum Allocation changed from \$60 to \$100 effective with Chapter Dues paid in January 2022.

POLICY

Council will pay a minimum of \$100/month to all chapters, prior to any separate deductions, whose monthly allocation of dues is under \$100. The Chapters receiving the allocation must complete the Chapter Minimum Allocation Financial Report and submit to the Council Office. Failure to submit the Chapter Minimum Allocation Financial Report may lead to the Chapter not receiving the minimum allocation.

DEFINITION

Chapter Minimum Allocation Financial Report – Form used by Chapter to report bank and investment balances and expenses for periods in which they received minimum allocation.

ROLES AND RESPONSIBILITIES

1. The Council's Finance & Operations Specialist
 - A. Will add minimum amount to monthly Chapter per Capita payments once DRS and Cash dues amounts are determined.
 - B. Will summarize semi-annual (Jan-June and July-Dec) amounts paid to chapters receiving the minimum allocation and prepare and mail Chapter Minimum Allocation Financial Report to affected chapter treasurers.
2. Chapter Treasurer
 - A. The treasurer of the chapter receiving the minimum allocation will complete the Chapter Minimum Allocation Financial Report and return it to Council Office.
3. District Representatives
 - A. May be asked to assist the Council's Finance & Operations Specialist in collection of late reports.

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

CHAPTER MINIMUM ALLOCATION FINANCIAL REPORT

January 1, YYYY - June 30, YYYY

CHAPTER NO. & ADDRESS

1. CASH OR INVESTMENT BALANCES

Bank or Institution Name	Account Type (CD, Checking, Savings)	Account No.	Balance or Market Value as of 06/30/YYYY

2. EXPENSES - January 1, YYYY THROUGH June 30, YYYY

Vendor Name	Amount Paid	Description or Reason for expense

Print name:

Signature:

(Must be Chapter Treasurer or President)

Title:

Date:

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

CHAPTER MINIMUM ALLOCATION FINANCIAL REPORT

July 1, YYYY - December 31, YYYY

CHAPTER NO. & ADDRESS

1. CASH OR INVESTMENT BALANCES

Bank or Institution Name	Account Type (CD, Checking, Savings)	Account No.	Balance or Market Value as of 12/31/YYYY

2. EXPENSES - July 1, YYYY THROUGH December 31, YYYY

Vendor Name	Amount Paid	Description or Reason for expense

Print name:

Signature:

(Must be Chapter Treasurer or President)

Title:

Date:

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Charitable Contributions Policy

PURPOSE

To clarify the information given in the Treasurer's Training regarding Chapters giving donations to charities.

SCOPE

- The dues money is to be used to inform and mobilize members first and foremost, to meet the purposes of our constitution and maintain our 501(c)(5) status. This can be done by spending funds on newsletters, sending members to RPEC functions, attracting new members to meetings, etc.
- If funds are left over, chapters should consider contributing a portion of the funds to the RPEC general fund, and/or the RPEC PAC fund.
- Then, if funds are left over, by a vote of the membership, it is allowable to donate to charity.

POLICY

According to our constitution, the 501(c)(5) status (IRS) charitable giving is **not** the main function of the dues.

- Therefore, dues should not be spent on charitable giving **until** the funds are used to meet the main purposes of RPEC.
- Annual charitable contributions shall not exceed 5% of chapter's annual per capita.
- **Chapters receiving minimum dues allocations from the Council Office are not permitted to make charitable contributions, other than contributions to RPEC, using chapter funds.**

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

CONFLICT OF INTEREST POLICY

A conflict of interest arises when a person in a position of authority over an organization, such as a director, officer, or manager, may benefit personally from a decision they could make. A conflict of interest policy consists of a set of procedures to follow to avoid the possibility that those in positions of authority over an organization may receive an inappropriate benefit.

Article I – Purpose

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (RPEC) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of RPEC or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II – Definitions

Interested Person

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a.** An ownership or investment interest in any entity with which RPEC has a transaction or arrangement,
- b.** A compensation arrangement with RPEC or with any entity or individual with which RPEC has a transaction or arrangement, or
- c.** A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which RPEC is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

Article III – Procedures

Duty of Disclosure

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, they shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

Procedures for Addressing the Conflict of Interest

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, they shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether RPEC can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in RPEC's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

Violations of the Conflicts of Interest Policy

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or

possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article IV – Records of Proceedings

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V – Compensation

- a. A voting member of the governing board who receives compensation, directly or indirectly, from RPEC for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from RPEC for services is precluded from voting on matters pertaining to that member's compensation.

Article VI – Annual Statements

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands RPEC is tax-exempt and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article VII – Use of Outside Experts

When conducting the periodic reviews as provided for in Article VI, RPEC may, but need not, use outside advisors. If outside experts are used, their use shall not

relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

I acknowledge that I have read and do hereby agree to the above terms and conditions.

Signature

Date

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Disbanded Chapter Financial Distribution Policy

PURPOSE

- Allocation of money upon disbandment of chapter
- Financial assets of disbanded chapters should follow members.

SCOPE

- Applies to disbanded chapter.
- Applies to chapter absorbing members of disbanded chapters.

POLICY

When a chapter disbands, the financial assets shall be transferred to the chapter(s) that their members have been reassigned to.

DEFINITIONS

- Disbanded – No active officers and/or request to disband made by chapter.
- Financial Assets - Cash, or cash equivalent & investments.

ROLES AND RESPONSIBILITIES

1. Council Office will assist in determination of where members will be assigned.
2. Funds will be transferred upon approval of chapter disbanding by the Executive Board.
3. Chapter will be closed with AFSCME by Council Office.

Retired Public Employees Council of Washington

Expense Reimbursement Policy

TRAVEL

- Reimbursement is defined as restoration to representatives listed below of actual expenses for travel and supplies while conducting the business of the Retired Public Employees Council.
- Actual expense is defined as the reasonable and prudent expenditure of Council funds.
- The most cost-effective modes of lodging or transportation should be considered when making or planning travel or expenditures for supplies.
- Mileage will be paid point-to-point as supported by online mileage data, subject to review.
- Car-pooling and/or ridesharing is encouraged.
- Mileage will be reimbursed at a rate set by the Executive Board. As of November 19, 2024, the current mileage reimbursement rate is \$0.35/mile.
- Staff will receive the current mileage rate set by the IRS.
- Reimbursement may be claimed for Council-planned events (Convention, Legislative Day) as indicated in the event notice.
- Costs of a personal nature are exempt.
- No reimbursement will be made for alcohol.
- Airline and railway travel will be made at economy class rates. Higher rates can be covered only if economy fares are not available. Vehicle rentals will be made for economy size class unless there is no other class available or when a larger vehicle is required for group or equipment transport, or there is a free upgrade to a higher class.
- If an additional night's stay has been pre-approved, due to weather or distance, the Council will provide reasonable reimbursement for one dinner the night of the additional stay and one breakfast the following morning, if not provided by the hotel.

APPLICATION

Reimbursement may be made to:

- Elected Council officials.
- Office staff
- Members of committees appointed by the president.
- Members requested by the president or staff to attend meetings and/or hearings
- Other individuals on a case-by-case basis as authorized by the President, Executive Board, Executive Committee, Finance Committee or Executive Director.

- General membership limited to and as indicated in Council-planned event (Convention, Legislative Day) notices.

PROCEDURES

- Reimbursement will be made by a completed and signed *Expense Reimbursement Form*. All receipts shall be attached.
- Necessary (at the request/approval of RPEC) incidental supplies, incidental mileage, tolls, ferry fares and parking shall be shown as separate items from the point-to-point mileage
- If personal attendance is required, or if virtual options are not available or are inadequate, and subject to approval by the Finance Committee, car rental, air, bus or rail travel costs may be substituted for personal vehicle travel when time, weather conditions or health/safety of the traveler are of consideration. When possible, these arrangements should be made through the Council to allow direct billing of the service.
- Travel advances may be requested based on estimated costs. Within forty-five (45) days of completion of travel, a final travel claim shall be presented, with original receipts and including a statement of any amount of over- or under expenditure. If the advanced amount exceeded actual costs, reimbursement will be made to the Council with the final billing. Underestimated costs will be covered.
- Expense vouchers shall be submitted to the Council office properly completed within thirty (30) days following when the expenditure or travel occurred.
- Travel and expense reports filed more than 30 days after the expenses were incurred will not be reimbursed without the approval of the Finance Committee.
- Convention Registration Fee Refunds: 50% of registration fees for Convention can be refunded in cases of hardship. Hardship includes illness (doctor's note), accident and weather conditions. Written refund requests will be made, as soon as possible, to the Finance Committee for approval. Requests for exceptions to this policy must be submitted in writing and will be reviewed by the Council Executive Committee to determine whether the requests for refund will be granted.
- The Finance Committee may make exceptions to this policy at their discretion for the benefit of the Council.

RETIRED PUBLIC EMPLOYEES COUNCIL

REASONABLE ACCOMMODATION POLICY

It is RPEC policy that all meetings be open and accessible to the membership. Meetings should be scheduled in venues that are ADA compliant. All reasonable accommodation should be made to ensure that members can participate in meetings. If there is a member who needs the services of an interpreter, the Chapter shall provide and pay for the services of a certified interpreter to meet the needs of the member. A portion of reasonable expenses incurred by the chapter may be reimbursed by the council office subject to a request to and prior approval by the Finance Committee.

RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

RECORDS MAINTENANCE AND RETENTION POLICY

All records shall be maintained in accordance with IRS regulations and the AFSCME Financial Standards Code.

Per AFSCME Financial Standards Code, Article III - 2024

Section 1.

The following records must be maintained or caused to be maintained by the Secretary-Treasurer or other financial officer. For Affiliates with bookkeeping or accounting staff, many of the tasks outlined may be delegated to those staff. All records listed below must be retained for a minimum of seven (7) years:

- A. Automated accounting system output, if any. See Appendix D for further information regarding auto-mated systems.
- B. Cash Book or Cash Receipts/Disbursements Journal. - Information required to be entered in the Cash Book must be recorded and totaled monthly. Those affiliates using automated accounting systems that provide comparable information as is found in the Cash Book need not maintain a manual Cash Book. Spreadsheets are an alternative for handwritten cash books.
- C. Bank receipts for all deposits.
- D. All documentation for receipts. - Each item deposited into a bank account should be clearly identified and supported by a remittance advice, dues deduction roster, dues rebate transmittal or other supporting documentation. A copy of that support must be kept on file. Affiliates should also retain a photocopy of the actual check received.
- E. All bank statements and copies of canceled checks. If the affiliate's bank or credit union does not normally provide canceled checks, the affiliate must either arrange with the bank or credit union to obtain front and back copies of their canceled checks or change its account(s) to an institution that can provide front and back copies of their canceled checks. Canceled checks are an essential part of the audit trail, as they are used to verify the accuracy of the affiliate's financial records.
- F. Bank reconciliations. Bank reconciliations should be prepared upon receipt of each statement and within thirty (30) days of the bank statement's end date. A copy of the reconciliation report should be attached to the bank statements. Timely reconciliation of the bank accounts may prevent losses due to errors or misuse of funds. Most bank statements have a bank reconciliation form that can be used.
- G. All check stubs and voided checks. For security purposes, the signature portion should be removed from all voided checks, which are to be clearly marked as "void" in large bold letters. Voided checks should not be

destroyed and are a part of the affiliate's financial records and should be retained in a secure place.

- H. All paid bills or invoices.
- I. Copies of all International Union and Council per capita tax reports, as well as local union rebate reports.
- J. All expense reports and all receipts for expenses reimbursed.
- K. All records of expenditures from any petty cash fund.
- L. All payroll records, including copies of filed IRS Form 941s, 940s, W-2s and Forms I-9, as well as any other required state and local payroll reporting. See Appendices for additional information.
- M. All financial reports. Prepared for the membership or Executive Board; all federal reports, including attachments (Form 990, Form 990-EZ, Form 1099, Form 1120-POL, LM-2, LM-3 or LM-4) filed with the Internal Revenue Service or the U.S. Department of Labor; all reports or tax filings required by state agencies and all financial reports filed with the International Union. The copies maintained in the union's records should include signatures and dates for all forms filed. See Article IX, Reporting, and the Appendices for additional information.
- N. All annual budgets, trustee audits, CPA audits and management letters.
- O. All mortgages, loan agreements, lease agreements, lease-purchase or time-payment contracts, and all other contracts of any nature that involve financial obligations on the part of the affiliate.
- P. All documents constituting evidence of ownership by the affiliate of any property or equipment of any nature.
- Q. Signed and dated copies of the Local Union Annual Financial Report (LUAFR) filed with the International Union.
- R. Signed and dated copies of annual Surety Bond Report filed with the International Union.
- S. Copies of any statements or transaction advice for any investment accounts maintained for the affiliate.
- T. Signed and dated copies of all affiliate officer or employee collective bargaining agreements, fringe benefits policies, and any policies regarding vacation, sick leave, severance, allowances, lost time, per diem, mileage, reimbursed dues, along with copies of records reflecting the accrued vacation, sick leave and severance of all officers
- U. Electronic backup and/or manual copies of all data files.
- V. Copies of the minutes of any Executive Board, membership, or committee meetings at which any financial decisions were made, approved or rejected.*
- W. Correspondence from government agencies.

Section 2.

The following records must be maintained or caused to be maintained regularly by the Recording Secretary or other recording officer of the affiliate for a minimum of seven (7) years:

- A. Minutes of all membership meetings, conventions, or other delegate assemblies.
- B. Minutes of all Executive Board Meetings.*
- C. Copies of all attachments to minutes including: financial reports, annual audits, annual budgets, mortgages, loan agreements, lease agreements, lease-purchase or time-payment contracts, and all other contracts of any nature which involve financial obligations on the part of the affiliate.
- D. Copies of all attachments to minutes, including financial reports and presentations, annual audits, annual budgets, mortgages, loan agreements, lease agreements, lease-purchase or time- payment contracts, and all other contracts of any nature that involve financial obligations on the part of the affiliate.

Section 3.

All financial books, records, property, and equipment in the custody of the union's officers and Executive Board are the property of the union.

When a new financial or recording officer is elected, the outgoing officer must give all such records to the incoming officer, as quickly as possible.

*Per IRS 501 (a) – “Compliance Guide for Tax Exempt Organizations other than 501 (c) (3)”

- Executive Board minutes shall be retained indefinitely.

All election records, including ballots, shall be retained by the Council Office and chapters for at least one year after the election.



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

RPEC Timelines & Key Events

Bi-annual Chapter Report Submittal Deadlines for 2025-2026

July 31st, 2025	Report for period of Jan. – July 2025*
November 30th, 2025	Report for period of Aug. – Nov. 2025*
May 31st, 2026	Report for period of Dec. 2025 – May 2026
November 30th, 2026	Report for period of June – Nov. 2026

**Irregular reporting periods in 2025 (first year of implementation). Regular reporting periods are Dec. – May and June – November.*

Requirements for Chapter Nominations & Elections Notices

Chapters are constitutionally required to provide members with written notice of nominations and elections **at least 15 days** before the meeting at which nominations are held.

Submit the newsletter containing the nominations notice to the Council Office **at least 5 weeks** before the meeting at which nominations will be held.

A memo is sent out in January to chapters that are to hold nominations and elections for that year. Each chapter receives a unique copy of the memo that includes deadlines specific to their chapter.

Chapter Newsletter Submittal Deadlines

- Send newsletters to the Membership Coordinator **at least 3 weeks prior** to the chapter meeting.
- Special exception: Early submittal deadline in December due to holiday closure.
 - Affects chapters that hold meetings in the second half of December or the first half of January (approximately).
- In November, chapters will receive notice from the Membership Coordinator of the holiday newsletter deadlines.

Overview of Key Events

Legislative Day/Week

- Annually in late January or early February
- Registration is typically open from October—January
- Every chapter and every Legislative District should have representation.

Convention

- Bi-annually in even-numbered years between August 1st and October 31st
- Convention Call is sent out the first week of March. Registration deadline is typically in early July.

- Seek delegate interest early. Delegates must be elected by vote of the membership.

Leadership Training & AFSCME Financial Standards Code Training

- Annually in June
- Registration opens by April and closes about two weeks prior to the event.
- Chapter officers, executive board members, trustees, and chapter committees/chairs are all expected to attend each year.
- Designed to support the Board-approved Strategic Plan and chapter vitality
- Strongly encouraged for all members – this helps expand the pool of potential leaders, which is key to succession planning.

RPEC Speakers Series

- Virtual events featuring a nationally recognized or federal speaker
- Hosted at least annually
- Registration/RSVP is required (for tracking attendance)
- Attendee(s) can report back at the chapter meeting and/or in the chapter newsletter to keep members without digital access informed. Recordings can also be repurposed.

Webinars

- May be educational, instructional, etc.
- Registration/RSVP is required (for tracking attendance)
- Attendee(s) can report back at the chapter meeting and/or in the chapter newsletter to keep members without digital access informed. Webinar recordings can be repurposed.

Legislative Update Calls

- Fridays at 2:00 PM
- Weekly during Legislative Session
- First Friday of the month during the interim session

Misc.

Blind Mailing (Recruitment)

- Facilitated by the Council Office
- Typically mailed out in early spring with returns received through early June
- Council Office hosts new member orientation webinar and sends out new member packets.
- Support retention and engagement by following up with new members (share this task among members and officers).

Political Action Committee (PAC) Mailing

- PAC contribution forms are sent to all members when approved by the PAC. Forms are also available on the website and typically in each quarterly newsletter.
- Educate members about the PAC in advance – members often confuse PAC forms with member dues invoices or AFSCME's PEOPLE solicitation mailings.

- Year-round: encourage members to contribute to the PAC, either through one-time contributions or monthly deductions; and, by vote of the membership, contribute chapter funds to the PAC.

Virtual Regional Leadership Meetings (Districts/Chapters)

- At least twice per year
- Arranged by District Executive Board members, with support from Membership Coordinator.
- Designed to improve chapter health and foster interactive problem solving among chapters within a District.



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

RPEC Convention Deadlines & Key Dates

Convention Related Deadlines/Dates for 2026:

February 28	Delegate Allocation
March 2	Convention Call sent to Chapters
March 13	Convention Webinar for Chapter Leaders
August 7	Amendments/Resolutions due in Council Office
August 24	Amendments mailed to EB, Chapters & Delegates
September 8	Resolutions mailed to Delegates
September 11	Convention Delegate Orientation Webinar
September 22	Convention Committee meetings
September 23	Convention Convenes
September 24	Executive Board Elections/Convention Concludes

Note: Deadlines for registration fees, requests for chapter financial assistance, etc., will be outlined in the Convention Call.

Delegate Allocation:

(RPEC Constitution, Article V, Section 13.A)

The number of delegates each chapter is entitled to elect shall be based on the number of dues-paying members on record with the council office as of the last day of February[...]

Convention Call:

(RPEC Constitution, Article X, Section 5)

Notice of the biennial convention shall be sent to affiliated chapters at least ninety (90) days prior to the date set for the convention.

Proposed Constitutional Amendments:

(RPEC Constitution, Article XI)

- Must be submitted in writing to the Council Office at least 45 days prior to Convention.
- Must bear the signature of the president or secretary submitting them.
- Must be accompanied by a brief statement explaining why the amendment is needed.
- Should include the date it was passed by the chapter.
- Council Office submits proposed amendments to the Council Executive Board, chapters, and Convention delegates at least 30 days prior to Convention.

Proposed Resolutions:

(RPEC Constitution, Article XII, Resolutions)

- Must be submitted in writing to the Council Office.
 - Does not need to be submitted in legal format (numbered lines). The Council Office will properly format the document.
 - In even-numbered years, resolutions to the Convention must be submitted at least 45 days prior to Convention.
- Must bear the signature of the president or secretary submitting them.
- Must be accompanied by a brief statement explaining why the resolution is needed.
- Should include the date it was passed by the chapter.
- Forwarded to Executive Board of the Council for adoption in odd-numbered years.
- Forwarded to the Convention body for adoption in even-numbered years.
 - Council Office sends proposed resolutions to delegates 15 days prior to Convention.

Pre-Convention Webinars:

The Council Office will host a Zoom meeting to answer questions about Convention, the registration process, etc., and to provide training on the processes and procedures for properly submitting resolutions and amendments.



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON
 906 Columbia St. SW Ste. 501, OLYMPIA, WA 98501

CHAPTER ELECTIONS REPORT FORM - YEAR OF _____
 (YYYY)

CHAPTER NAME	CHAPTER NUMBER
MEETING DATE	REGULAR MEETING TIME
MEETING PLACE	MONTH ELECTIONS ARE HELD
ADDRESS	TERM OF OFFICE (How many years?)

NAME	MAILING ADDRESS	CITY	ZIP	PHONE	LEG. DIST.	EMAIL
PRESIDENT						
VICE-PRES.						
SECRETARY						
TREASURER						
MEMBERSHIP CHAIR						
PAC CHAIR						
LEG. COMM. CHAIR						

IF ANY CHANGES OCCUR, PLEASE CALL RPEC COUNCIL OFFICE @ 1-800-562-6097



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON
 906 Columbia Street SW, Suite 501, OLYMPIA, WA 98501

EXECUTIVE BOARD MEMBERS-AT-LARGE/CHAPTER TRUSTEES

NAME	MAILING ADDRESS	CITY	ZIP	PHONE	LEG. DIST.	EMAIL
Executive Brd.						
Executive Brd.						
Executive Brd.						
Executive Brd.						
Trustee						
Trustee						
Trustee						

IF YOU HAVE ADDITIONAL BOARD MEMBERS OR TRUSTEES AND NEED ADDITIONAL COPIES, OR IF ANY CHANGES OCCUR, PLEASE CALL RPEC COUNCIL OFFICE @ 1-800-562-6097

COMMENTS: PLEASE ENCLOSE A COPY OF THOSE IN ATTENDANCE FOR THE PURPOSES OF RECORDKEEPING.



Retired Public Employees Council of Washington

Meeting Location: _____

Meeting Time: _____

Chapter ____ (_____)
 Date: _____ Membership Meeting Sign-In

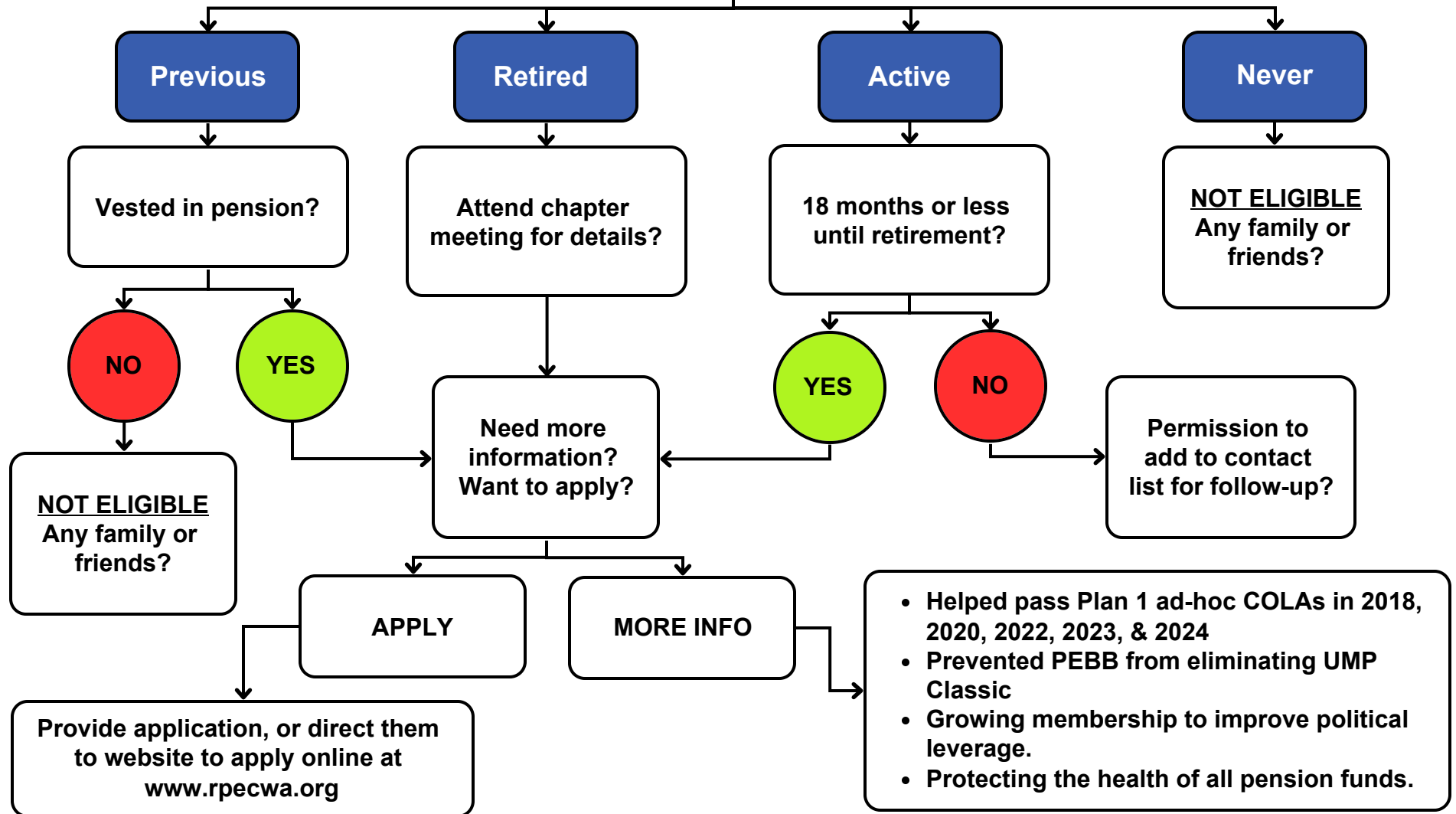
Name	Phone	Email	Virtual Attendee
			☐
			☐
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RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Member to Member Recruitment Flowchart

Public Sector Employment Status



3. Chapter Membership Plans



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Overview of Chapter Membership Plans

What are Chapter Membership Plans?

Chapter membership plans are written documents developed and implemented at the chapter-level to improve chapter vitality and support the sustainability of the organization. These include leadership succession planning and member recruitment, retention and engagement plans.

Leadership Succession Plans

In any organization, changes in leadership are inevitable. Proactively prepare for transitions in leadership by identifying and developing potential leaders to prevent vacancies/gaps in leadership. Provide mentoring, coaching and development opportunities for potential leaders. The Member Profile document was developed to be used for succession planning.

Member Recruitment Plans

Chapters are responsible for local recruitment efforts. Consider outreach to union locals, participation at regional labor council meetings, tabling opportunities, following up on WFSE potential members lists, and other ways to integrate former coworkers or union leaders/members into RPEC.

Membership Retention & Engagement Plans

These are especially aimed at new and inactive members. Can include tactics for engaging members in legislative advocacy, improving chapter meeting locations or programming, member communications and contacting new, inactive, or recently dropped members.

Developing Chapter-level Membership Plans:

Chapters may use the provided templates/sample plans as a starting point to then tailor to the specific needs of the chapter. It is important to understand the current and future needs of the chapter, as well as RPEC's strategic plan goals and priorities. In the development of your chapter plans, refer to the following documents.

Strategic Plan 2025 Addendum

Outlines the tactics and timelines for each of the five goal areas of the Strategic Plan: Organizational Sustainability, Membership Recruitment, Membership Retention and Engagement, Member Communications, and Federal Advocacy. The tactics are designated for the RPEC Executive Board, Council Office, and chapters. Refer to this document, particularly the chapter tactics, to ensure that chapter's plans align with the strategic plan goals and priorities.

Roles & Responsibilities for Membership Recruitment & Retention

This document delineates the roles and responsibilities of the RPEC Executive Board, RPEC Membership Committee, chapter leaders, chapter committees/chairpersons

and the Membership Coordinator for membership recruitment and retention efforts. As you develop your plans, use this document as a reference to determine *who* in the chapter will do *what*.

Implementing Chapter-level Membership Plans:

Turn words into action. It is not enough to simply have the plan on paper. Plans will need to be continuously reviewed, updated and evolved based on learnings in implementation or changes in the chapter or organization's needs.

Chapter membership plans should be provided to the RPEC Membership Committee and respective Executive Board District Representative(s) at least once per year.

Chapters should report efforts and successes to the Membership Committee and Executive Board regularly (see Effective Communications Network for Organizational & Chapter Sustainability). District Representatives and the Membership Committee are to support chapters with the implementation of these plans.

Retired Public Employees Council

Chapter ____ Membership Plan

Recruitment

List current and future efforts to recruit new members such as:

Personal contacts:

Agency contacts:

Outside group contacts:

Existing local recruitment actions:

Retention

List current and future efforts to retain members such as:

Engaging Members in Legislative Advocacy:

- Legislative Committee chair
 - o A designated member to report to their chapter on legislative progress and on opportunities for members to get involved in advocacy
 - Include in communications
- Mobilizing members for signing in pro, letter campaigns, etc.

Meeting Site/Environment Improvements (hybrid):

- Equipment to support hybrid meetings
 - o Sufficient Wi-Fi
 - o TV/projector
- Quiet and private

Member Communication:

- Meeting reminders
 - o Chapter newsletter
 - o Group emails
 - o Robocalls
 - o Personal contact

Contact with New/Dropped members:

- New member retention plan
- Designated member(s) for contacting dropped members
 - o If needed, Council Office has a script

List Best Practices for Both Recruitment and Retention

RPEC New Member Retention & Engagement Plan

Month 1: Welcome

- (Council) Send a new member packet in the mail.
 - Includes benefits pamphlet, new member info, new member letter.
- Call or email to welcome the new member.
 - Get them excited about upcoming events, answer questions, and express your gratitude.

Month 2: Engage

- Personally invite them to participate in an upcoming event or meeting and let them know you're excited to work with them.
 - Offer to meet with them separately to answer any lingering questions.
 - Find out what issues are most important to them.

Month 3: Check-In

- Follow up with the member regarding their experience with the chapter so far.
 - Reaffirm that you're grateful for their participation and you want their experience in the chapter to be positive.
 - Answer any questions and give them an opportunity to speak to any ideas or concerns they may have.

Month 4: Provide

- Provide access to or contacts for resources/information that address their needs.
 - This could be an email about local or federal issues that are major concerns or interests of the new member.

Month 5: Mentor

- Identify a chapter leader or a member who would be interested in mentoring new members.
 - The mentor would support them through the end of their first year of membership.
 - Ideally, a mentor would support them in accessing benefits, help them stay current on council and chapter activities, and provide general support.

Month 6: Survey

- Review your retention strategy by asking the new member questions to help identify if they are at risk of lapsing or are engaged.
- Ask yourself:
 - Have they participated in any meetings, events, or advocacy activities?
 - If so, were they engaged?
 - When was the last time a chapter leader contacted them directly?
- Ask the new member:
 - Have they accessed RPEC's member-only benefits?
 - Has the chapter/council addressed your main interests and concerns?
 - On a scale of 1 to 10, how satisfied are you with your membership?

Month 7: Connect

- This is a time to strengthen your personal engagements with the new member.
 - Consider sending a hand-written note, making a personal phone call, or offering to meet on Zoom.

Month 8: Highlight

- Communicate to the new member what you appreciate about their involvement with the council/chapter.
 - Consider giving them a shoutout in a chapter email or newsletter.

Month 9: Encourage

- This is a time to encourage the member to consider playing a greater role in the chapter.
 - They may be a good mentor for any incoming new members.
 - They may be a great fit for a leadership position.
 - They could be helpful participating in volunteer opportunities.

Month 10: Demonstrate

- At this time, you want to convey to your new member the value of their membership.
 - Share accomplishments that the council/chapter has achieved.
 - Include member testimonials about the value of being a member.

Month 11: Renew

- If the member is a cash member, encourage them to renew and that they have been an outstanding individual in your chapter.
- Continue to demonstrate the value of membership and the gratitude you have for their participation.

Month 12: Celebrate

- Consider acknowledging anniversaries for members.
- Send out a card to congratulate and thank them for their year of membership.

NOTES:

- Seek permission from members before giving them a personal shoutout in an email, newsletter, robocall, etc.
- Consider providing agendas ahead of meetings to help demonstrate to new members the value of attending chapter activities/meetings.

RPEC New Member

Retention & Engagement Plan Checklist

Name: _____

Checklist Start Date: _____

Email: _____

Phone: _____

MONTH 1: WELCOME

- ☐ Contact & welcome them.
- ☐ Did they receive a new member packet?

MONTH 2: ENGAGE

- ☐ Personally invite them to an upcoming event or meeting.
- ☐ Offer to meet 1-on-1 to answer questions.
- ☐ Determine what issues are most important to them.

MONTH 3: CHECK-IN

- ☐ Follow up & ask how their experience has been so far.
- ☐ Shows gratitude & express you want their experience to be positive.
- ☐ Let them ask questions & share ideas.

MONTH 4: PROVIDE

- ☐ Provide resources & info to address their needs & the issues they are invested in.

MONTH 5: MENTOR

- ☐ Identify a chapter leader or interested member to mentor them through their first year of membership.

A mentor would assist the member with accessing benefits, getting involved in council & chapter activities, etc.

MONTH 6: SURVEY

- ☐ Review retention strategy. Ask questions to determine if they are at risk of dropping or not renewing.

(See New Member Retention Plan for example questions.)

MONTH 7: CONNECT

- ☐ Strengthen personal engagement with the member.

Consider sending them a handwritten note, making a personal call, or offering to meet on Zoom.

MONTH 8: HIGHLIGHT

- ☐ Show appreciation and praise the member for their involvement.

Consider including a shoutout for the member in a newsletter or mass email (get permission from the member first).

MONTH 9: ENCOURAGE

- ☐ Encourage the member to consider playing a greater role with the chapter and/or the council.

Ideas: serving as a new member mentor, leadership, volunteer work, committee/workgroup, etc.

MONTH 10: DEMONSTRATE

- ☐ Convey the value of membership.
- ☐ Have they explored member benefits?
- ☐ Have they created a website account?

Mention RPEC accomplishments, the threats to their benefits, member testimony, news updates, etc.

MONTH 11: RENEW

- ☐ Encourage them to continue their membership and remind them of the value. (If cash dues, they have to initiate renewal.)
- ☐ Express gratitude for their participation and being a part of RPEC.

MONTH 12: CELEBRATE

- ☐ Acknowledge their one-year RPEC membership anniversary.
- ☐ Congratulate them by sending a card, note, or some other personal gesture.

Notes:

RPEC New Member

Retention & Engagement Plan Checklist

Name: _____

Checklist Start Date: _____

Email: _____

Phone: _____

MONTH 1: WELCOME

MONTH 2: ENGAGE

MONTH 3: CHECK-IN

MONTH 4: PROVIDE

MONTH 5: MENTOR

MONTH 6: SURVEY

MONTH 7: CONNECT

MONTH 8: HIGHLIGHT

MONTH 9: ENCOURAGE

MONTH 10: DEMONSTRATE

MONTH 11: RENEW

MONTH 12: CELEBRATE

Notes:



MEMBER PROFILE

PERSONAL INFORMATION:

Last Name:		First Name:		Chapter:					
Date of Birth:	 Day	 Month	 Year	Retirement Date:	 Day	 Month	 Year	Plan:	
Retired From:		Phone:		Email:					
Mailing Address		City		State	Zip Code				
Address:									

QUESTIONS

Question 1: What is your background?

Answer:

Question 2: What did you do for work? (skills and talents)

Answer:

Question 3: What's important to you regarding RPEC membership and advocacy?

Answer:

Question 4: What brought you to the chapter meeting? (or why don't you attend?)

Answer:

Question 5: What will keep you coming to meetings? (or what would entice you to attend)

Answer:

Question 6: What made you join RPEC?

Answer:

Question 7: Are you interested in participating in any of the following?

Local Advocacy | Chapter Leadership | Membership Organizing | Finances |
Event Planning | Legislative Week | Convention | Member Recruitment

Other: _____

QUESTIONS

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

Question:

Answer:

4. Miscellaneous Information

Retired Public Employees Council of Washington

Chapter Meetings & Officers

01 East Pierce County

Meridian Cafe
213 N Meridian

2nd Wednesday monthly, Sep-Jun
Puyallup

Chapter Officers

Chapter President	ROBERT	BANDARRA	bandarrabob@gmail.com	(360) 296-3005
Chapter Treasurer	KRISTIN	BANDARRA		(360) 599-0482

02 Olympia Area

Olympia Center (hybrid, except in May & Dec)
222 N Columbia St, Room A

2nd Thursday monthly, Sep-May
Olympia

Chapter Officers

Chapter President	GAIL	RICHARDSON	rich235@comcast.net	(360) 556-5106
Chapter Secretary	MARTIN	ROLLINS	martin.rollins@gmail.com	(509) 280-0408
Chapter Treasurer	LIZ	LARSEN	LDLARSEN900@GMAIL.COM	(360) 951-5958

03 Seattle Area

Razzi's Pizzeria (hybrid)
8523 Greenwood Ave N

3rd Tuesday monthly, Sep-May
Seattle

Chapter Officers

Chapter President	MATTHEW	GROSHONG	mgroshong1@gmail.com	(206) 678-5394
Chapter Vice-President	KENT	QUESTAD	drkent@questad.us	(206) 527-3557
Chapter Vice-President	COLLEEN	MCGINN	TREFRGFRMR@aol.com	(206) 725-6294
Chapter Secretary	MARSHA N	GRESHAM	greshamn@frontier.com	(206) 271-4063
Chapter Treasurer	MELVIN DAVID	RADER	mdavidrader@gmail.com	(206) 228-0055

06 Everett Area

Snohomish Co. PUD (hybrid)
2320 California St

1st Tuesday monthly, Mar-May, Sep, Nov
Everett

Chapter Officers

Chapter President	CHRISTINE	LAVRA	4ce4prof@earthlink.net	(425) 252-3397
Chapter Vice-President	RENEE C	PEARE	rcpeare@frontier.com	(425) 347-7754
Chapter Treasurer	JEFFREY	WHEELER	waranger247@gmail.com	(425) 220-0061

Retired Public Employees Council of Washington

Chapter Meetings & Officers

07 Whatcom County Area

Squalicum Yacht Club
2633 Harbor Loop Dr

1st Monday monthly, Nov-Jan & Mar-Jun, 2nd Mon in Sep
Bellingham

Chapter Officers

Chapter President	RICHARD	DEBAY	rick.1060@hotmail.com	(360) 319-6336
Chapter Vice-President	PEG	BARGA	pegbarga@gmail.com	(360) 927-1621
Chapter Secretary	HELEN E	MORAN	helens.ranch@gmail.com	(360) 961-8202
Chapter Treasurer	ELIZABETH	PERNOTTO	betsyp1045@gmail.com	(360) 647-1752

08 Skagit County Area

Sedro-Woolley Senior Center
715 Pacific St

2nd Thursday monthly, Sep-Jun
Sedro-Woolley

Chapter Officers

Chapter President	ANTHONY	HERNANDEZ	armj5657@yahoo.com	(360) 391-5033
Chapter Vice-President	LYNN	CAMPBELL	campbelllynn87@gmail.com	(360) 708-7044
Chapter Secretary	NAOMI	FOOTE	naomifoote@hotmail.com	(360) 336-3502
Chapter Treasurer	GUNDA	VESQUE	gvesque16@gmail.com	(360) 508-2641

09 Vancouver Area

Old Town Burger & Breakfast
813 W Main

3rd Thursday monthly, Sep-May
Battle Ground

Chapter Officers

Chapter President	SAM	AROLA	searola@tds.net	(360) 606-1806
Chapter Vice-President	WAYNE	SEED		(360) 225-8152
Chapter Secretary	JULIE	MCBRIDE		(360) 567-9483
Chapter Treasurer	JOHN	LATTA	jclatta@gmail.com	(360) 335-8083

10 Fort Steilacoom

Homestead Restaurant
7837 S Tacoma Way

2nd Tuesday monthly, Sep-Jul
Tacoma

Chapter Officers

Chapter President	ROBERT	DEVLIN	rdevlin793@gmail.com	(253) 878-2844
Chapter Vice-President	JOHN F	HENSON	bubba7078@gmail.com	(253) 223-5949
Chapter Secretary	JESSICA	TOMKINS	jitjewel1@aol.com	(253) 779-4500
Chapter Treasurer	ROBERT	BRANDT	brandtrl@hotmail.com	(253) 564-9273

Retired Public Employees Council of Washington

Chapter Meetings & Officers

11 Walla Walla Area

Yan's China Buffet
1618 Plaza Way

2nd Tuesday monthly, Sep-May
Walla Walla

Chapter Officers

Chapter President	BARRY	JENKINS	barryjenkins53@yahoo.com	(509) 529-6372
Chapter Vice-President	MICHAEL R	VINTI	mikevinti@yahoo.com	(541) 938-5392
Chapter Treasurer	C LYNN	SMITH	smithchet77@gmail.com	(509) 525-7398

12 Tacoma Area

Homestead Restaurant
7837 S Tacoma Way

2nd Wednesday monthly, Sep-Jun
Tacoma

Chapter Officers

Chapter President	CAROL	DOTLICH	wfsecarol@comcast.net	(253) 985-3280
Chapter Vice-President	LAWRENCE	TURNBULL	lawrenceturnbull52@gmail.com	(253) 282-1609
Chapter Vice-President	CELESTE	SULIIN BURRIS	csburris@mac.com	(253) 376-0764
Chapter Secretary	HELEN	PARKS	ajasbestg@aol.com	(253) 973-7153
Chapter Treasurer	BRENDA K.	MOORE	moorbkay@msn.com	(253) 627-2110

13 Spokane Area

Longhorn BBQ
7611 W Sunset Hwy

2nd Thursday monthly, Feb-Jun & Aug-Dec
Spokane

Chapter Officers

Chapter President	CINDY	HALL	banditsgirl@gmail.com	(509) 844-3277
Chapter Vice-President	KAROL	HOFFMAN	karol.hoffman@gmail.com	(509) 326-6432
Chapter Secretary	VALERIE	MCMILLAN	vmcmillan144@gmail.com	(509) 998-7561

16 Yakima Area

Shari's Cafe & Pies
309 S 1st St

3rd Wednesday monthly, Sep-May
Selah

Chapter Officers

Chapter President	JULIANNE	MOORE	juliannemoore@aol.com	(509) 961-7548
Chapter Vice-President	DEBBY	STANARD	debbystanard@yahoo.com	(509) 834-5885
Chapter Secretary	CARLA	JOURNAGAN	carla8@mindspring.com	(509) 453-3866
Chapter Treasurer	REBECCA	WITHROW	rbeck370@gmail.com	(509) 966-9871

Retired Public Employees Council of Washington

Chapter Meetings & Officers

17 Lewis County Area

Ramblin Jack's Ribeye Restaurant
1336 Rush Road

1st Wednesday monthly
Chehalis

Chapter Officers

Chapter Vice-President	CRAIG D	ROBBINS	cbrobbins78@gmail.com	(360) 262-3930
Chapter Secretary	SHEILA	JOHNSON-TEE...	sjohnsonteeter@gmail.com	(360) 280-7368
Chapter Treasurer	PATRICIA	MALTSBERGER	pmaltsbe@yahoo.com	(206) 778-4553

18 Grays Harbor

Varies (hybrid)
Varies

2nd Tuesday monthly, Sep-May
Montesano, Aberdeen

Chapter Officers

Chapter President	RUTH	COOK	jrcooks@comcast.net	(360) 533-0069
Chapter Secretary	DONNA K	ALBERT	donna.albert@gmail.com	(360) 280-9413
Chapter Treasurer	ALAN	TELECKY	telecky@comcast.net	(360) 533-5936

19 Kitsap County Area

Round Table Pizza
3276 NW Plaza Rd, Ste 101

2nd Wednesday quarterly, Jan, Apr, Jul, Oct
Silverdale

Chapter Officers

Chapter President	SANDRA	REYNOLDS	sandielee@comcast.net	(253) 820-6620
Chapter Vice-President	MARVA B.	LANG	mvkiska@comcast.net	(360) 473-7897
Chapter Secretary	ELAYNE	STODOLA	ESTODOLA@HOTMAIL.COM	(360) 900-9010
Chapter Treasurer	THERESA	ADAMS	mustangmama1951@icloud.com	(360) 871-2523

20 Cowlitz-Wahkiakum Area

Longview Country Club (hybrid)
41 Country Club Drive

3rd Wednesday monthly, Sep-Jun
Longview

Chapter Officers

Chapter President	JUDY V	DEVOE	judyjod@aol.com	(360) 261-2780
Chapter Vice-President	PENNY	HALL	pennyhall1@tds.net	(360) 231-4461
Chapter Secretary	MAURICE	GARROTT	cc911mo@aol.com	(360) 673-2022
Chapter Treasurer	HERBERT W	ANDERSON	debandherb@comcast.net	(360) 423-5817

Retired Public Employees Council of Washington

Chapter Meetings & Officers

21 Tri-cities Area

Red Lion Hotel
2525 N 20th Ave

1st Tuesday monthly, Feb-Dec
Pasco

Chapter Officers

Chapter President	ROBIN	REGO	Rarego1213@gmail.com	(509) 221-1130
Chapter Vice-President	SUSAN	LESCHINSKI	gmasusan.retired@gmail.com	(509) 308-4594
Chapter Secretary	CAROL	TRAVIS	carol.travis6@gmail.com	(509) 786-1786
Chapter Treasurer	STEVEN	GAMBLE	sgmgamble@charter.net	(509) 586-7403

22 Jefferson County Area

Hwy 20 Road House
2152 Sims Way

2nd Tuesday quarterly, Jan, Apr, Jul, Oct
Port Townsend

Chapter Officers

Chapter President	MICHAEL	MARSTON	marston@cablespeed.com	(360) 821-1211
Chapter Vice-President	IRIS	WEHRLE	irisandson@gmail.com	(360) 269-9115
Chapter Secretary	CYNE	OKINCZYC	cyneok@gmail.com	(360) 358-5098
Chapter Treasurer	TROY	MCKELVEY	troymckelvey3@gmail.com	(360) 643-0592

23 Clallam County Area

Lincoln Center
905 W 9th St

3rd Thursday of Mar, May, Oct, Dec
Port Angeles

Chapter Officers

Chapter President	ROBERT	ZINDEL	bobzindel70@gmail.com	(360) 477-1347
Chapter Vice-President	DAVE	MCKEE	davehmckee@hotmail.com	(360) 928-3586
Chapter Secretary	LOIS	DANKS	lfthanks@yahoo.com	(360) 808-3196
Chapter Treasurer	JANET	CATTANO	jancatt@gmail.com	(360) 683-6651

24 Mason County Area

Mason Co. Senior Activities Center
190 W Sentry Dr

3rd Wednesday of Jan, Apr, Jul, Oct
Shelton

Chapter Officers

Chapter President	JOSEPH R	VUKICH	josephvukich@gmail.com	(360) 791-5936
Chapter Secretary	KATHRYN	ABERNATHY-R...	nabernath@hotmail.com	(360) 426-5003
Chapter Treasurer	KATHRYN	ABERNATHY-R...	nabernath@hotmail.com	(360) 426-5003

Retired Public Employees Council of Washington

Chapter Meetings & Officers

27 Chelan-Douglas-Okanogan-Grant-Adams-Kittitas Co.

Wenatchee Sr Center (hybrid)
1312 Maple St

2nd Thursday monthly, Sep-May
Wenatchee

Chapter Officers

Chapter President	DON	BOXFORD	dbox@nwi.net	(509) 665-8818
Chapter Vice-President	BRIAN L	HATCH		(206) 938-3589
Chapter Secretary	STEPHEN	SYPE	stevesype@live.com	(509) 421-2571
Chapter Treasurer	ELIZABETH E	PEIRCE	sagebrsh@nwi.net	(509) 663-9572

28 University of Washington Area

Claim Jumper Steakhouse & Bar
5901 S 180th St

3rd Tuesday every even month
Tukwila

Chapter Officers

Chapter President	MARY	MARBLES	mmarbles46@icloud.com	(206) 322-4914
Chapter Vice-President	ALMA-JEAN	MARION	alma-jean@comcast.net	(206) 721-3088
Chapter Secretary	BENESTER	FIELDS	bienestar111@yahoo.com	(206) 722-6755
Chapter Treasurer	JUANITA R	TAYLOR	missroxy5@yahoo.com	(253) 236-4047

30 South King County Area

Tuscany at Des Moines Creek
21830 Marine View Dr S

2nd Wednesday every odd month
Des Moines

Chapter Officers

Chapter President	DEBORAH	HAIGH	debbie14haigh@yahoo.com	(509) 688-9489
Chapter Vice-President	GARY	DURST	durst.wa@netzero.net	(206) 849-1409
Chapter Secretary	WILHELMINA	DANIEL	minwdaniel@aol.com	(425) 306-5160
Chapter Treasurer	GEORGE	CHAN	gkchan1234@yahoo.com	(206) 396-9003

35 King County Metro

Varies
Varies

Day varies, quarterly Jan, Apr, Jul, Oct
Seattle

Chapter Officers

Chapter President	WILLIAM	ZIEGLER	flzwez@hotmail.com	(206) 713-1879
Chapter Vice-President	LINDA	NELSEN	linda.nelsen@comcast.net	(206) 282-9661
Chapter Secretary	CORYDON	NELSEN	cory.nelsen@comcast.net	(206) 769-8848
Chapter Treasurer	LINDA J	ZIGLER	1lindaz@comcast.net	(425) 775-3783

Retired Public Employees Council of Washington

Chapter Meetings & Officers

37 Lynnwood Area

Mountlake Terrace Library (hybrid)
23300 58th Ave W

1st Thursday monthly, Sep-Jun
Mountlake Terrace, Lynnwood

Chapter Officers

Chapter President	WILLIAM	DEHMER	billorsue@comcast.net	(206) 313-2845
Chapter Vice-President	THERESA	LUDWICK	theresawestludwick@gmail.com	(425) 508-7787
Chapter Treasurer	KATHRYN	CHAPMAN	humingb1rd@comcast.net	(425) 387-7242

39 Asotin-Garfield Area

Mama K's Restaurant, Pataha Flour Mill
Varies

Day varies monthly, Sep-Jun
Clarkston, Pomeroy

Chapter Officers

Chapter President	NICK	FIORE	nifjr4x@gmail.com	(208) 790-2345
Chapter Vice-President	STEVEN R	ENGLEHORN	ssenglehorn@gmail.com	(509) 243-3398
Chapter Secretary	STEVEN	LEE	LEE99403@GMAIL.COM	(509) 780-2036
Chapter Treasurer	STEVEN	LEE	LEE99403@GMAIL.COM	(509) 780-2036

46 East King County Area

Family Pancake House
17621 Redmond Way

3rd Wednesday monthly, Aug-May
Redmond

Chapter Officers

Chapter President	WARREN D	WARFIELD	wdw330@comcast.net	(425) 522-4130
Chapter Vice-President	MARIANNE	WILKINS	marianne@msn.com	(425) 391-4284
Chapter Secretary	LINNEA	MULDER	ismulder@comcast.net	(206) 605-0390
Chapter Treasurer	DENNIS G	MONTGOMERY	denmont@comcast.net	(425) 746-1158



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Glossary of Frequently Used Terms

AFSCME Terms

AFSCME International: This is the national AFSCME union headquartered in Washington, D.C., and they coordinate the union's actions on major national issues such as health care, work safety, and social security. The national union also represents members in the US Congress and coordinates political activities for federal elections. It also provides resources and expert help to the councils and local unions.

AFSCME PEOPLE: (Public Employees Organized to Promote Legislative Equality) This is the Political Action Committee (PAC) of AFSCME. Funds are raised through contributions from AFSCME and AFSCME Retiree members in good standing. The funds are used to elect pro-union federal officials, including the president of the United States, state governors, and members of Congress. Contributions to AFSCME PEOPLE are optional for RPEC members.

AFSCME Retirees: Also based in Washington D.C., AFSCME Retirees is a division of AFSCME International. RPEC is Chapter 10 of AFSCME Retirees. Like AFSCME International, AFSCME Retirees coordinates the union's actions on major national issues impacting retirement security for public sector retirees. The union represents its chapters to Congress and leads national organizing efforts to urge lawmakers to pass legislation that improves retirement security.

AFSCME Strong: AFSCME's internal organizing campaign to grow membership through one-on-one conversations.

Local: A union local represents one or more bargaining unit of state, city, or county workers. RPEC membership is open to all public sector retirees regardless of their union affiliation. RPEC chapters and the Council's Membership Coordinator meet with the leaders of locals to raise the visibility of RPEC and recruit Associate Members.

RPEC Terms

501(c)5: As an affiliate of AFSCME Retirees and the AFL-CIO, RPEC is a labor advocacy organization. RPEC is a non-profit but not a charitable organization and is registered with the Washington Secretary of State and the IRS as a 501(c)5 tax exempt organization.

Associate Member: Membership in RPEC is open to current public sector employees who are within 18 months of retirement.

Chapters: These are sub-entities of RPEC like the locals of unions. Chapters are designated in geographic areas within districts (regions of the state). Chapters are made up of members in good standing. Chapters elect a slate of officers and board members at-large to govern chapter business, coordinate member mobilization, and organize in-person, hybrid and Zoom meetings featuring noteworthy speakers. Two RPEC chapters are employer based: Chapter 28 – University of Washington, and Chapter 35 – King County. There is also a chapter (99) of members residing outside of Washington State. This chapter does not elect officers or Convention delegates.

Convention: The Convention body is the governing body of RPEC. The biennial Convention is held in even-numbered years. Decisions rendered by the Convention body guide the organization over the subsequent two years before the next Convention.

Council: This term is used to describe RPEC's headquarters, located in Olympia, Washington. The Council is organized into nine districts with 30 chapters statewide.

Council Office: This term is used to describe RPEC's paid professional staff, which includes five full-time employees supervised by the Executive Director.

Delegate: A member in good standing elected by their local chapter to attend and participate in the proceedings of Convention. Each chapter may elect one delegate for every 25 members. (See RPEC Constitution, Article 5, Section 13.)

Districts: To ensure members are well represented in decision-making at a state level on the RPEC Executive Board, the state has been divided into nine districts - specific geographic regions. The Convention body elects District Representatives who represent the interests, needs, and priorities of members within those nine districts.

District Representatives: The Executive Board is composed of the Executive Officers who make up the Executive Committee, the Executive Director, and 10 elected District Representatives. The District Representatives are nominated and elected at Convention by the chapters designated within each of the nine districts. District 9 chapters nominate and elect two District Representatives. District Representatives serve a two-year term.

Executive Board: The statewide Executive Officers and District Board members of RPEC who are elected by the Convention body. The Executive Board is the governing body of the organization except when the Convention is in session. The Executive Board has all the authority of the Convention except the right to amend the Constitution. The Executive Board meets at least four times per year. Board meetings are open to all RPEC members in good standing.

Executive Officers: The president, vice president, treasurer, and secretary (or secretary-treasurer) of the Council or chapter.

Guiding Documents: RPEC's chief guiding documents include the AFSCME Constitution, the AFSCME Financial Standards Code, the RPEC Constitution, Appendix A (Chapter Constitutions and By-Laws), the AFSCME Retirees Officers Manual, and the AFSCME Retiree Election Manual.

Members in good standing: A retired public sector or eligible union retiree whose membership is current.

Membership eligibility: RPEC membership is open to all public sector retirees regardless of whether they have been affiliated with a union. Membership is also open to those vested in the Department of Retirement Systems and will draw a pension upon retirement but have separated service from a public agency in Washington. Associate members are public sector employees within 18 months of retirement.

Mobilization: Actions led by the Council Office, and sometimes District Representatives, to bring RPEC members together to advance the organization's legislative and policy priorities. Member mobilization is generally conducted by email, RoboCalls and text messaging, around key pieces of legislation or the need for members to testify in key legislative hearings.

Political Action Committee (PAC): Established in the 1980s, RPEC manages its own PAC, composed of member contributions. Funds are spent to elect pro-retiree candidates at state and local levels. The PAC functions like a standing committee. The chair and members are appointed by the Executive Board. Members make PAC contributions through an additional pension deduction through the Department of Retirement Services (DRS) or through credit card or cash donations on a recurring or one-time basis.

Quorum: The minimum number of members required to conduct business at a properly called meeting. Quorums ensure that there is enough representation at meetings before making decisions. Without a quorum, the proceedings of that meeting are invalid. The chapter's Appendix A should state what constitutes a quorum.

RPEC Standing Committees: Committees that represent the statewide interests of all RPEC members. Except for the Finance Committee, the standing committee chairpersons and members are appointed by the President, subject to the approval of the Executive Board.

- **Executive Committee:** The statewide Executive Committee includes RPEC's president, vice president, treasurer, and secretary. These officers are elected by majority vote at the Convention. The Executive Director also sits as a non-voting member of the Executive Committee. The Executive Committee is empowered to make recommendations to the Executive Board. The Executive Committee has the authority to act on all matters which the Executive Board is empowered to act on when, in the judgement of the president, the action cannot be postponed until the next full Executive Board meeting. Actions of the Executive Committee are subject to the approval of the Executive Board.
- **Finance Committee:** The Finance Committee is chaired by RPEC's Treasurer and composed of the President and 3 District Board members appointed by the Executive Board following the elections at Convention. The Vice President and Secretary are ineligible to serve on the Finance Committee, per the Constitution.
- **Legislative Committee:** The Legislative Committee supports the Executive Board with developing, promoting, and advancing the legislative goals of the organization at the state and federal levels.
- **Membership Committee:** The Membership Committee provides guidance and support to the Executive Board, chapters, and chapter membership chairs on accomplishing RPEC's membership recruitment and retention goals and objectives.

Strategic Plan: Strategic plans are dynamic, proprietary documents that are regularly evaluated and modified based on data, feedback, and emerging challenges and opportunities. In November 2023, the Executive Board adopted RPEC's new strategic plan, which outlines RPEC's overall direction and goals to guide decision-making and resource allocation from 2023-2027.

Workgroups: RPEC Workgroups are composed of members in good standing who have expressed interest in studying issues and making recommendations to appropriate standing committees to inform RPEC's legislative and policy priorities and action. These members are appointed by the President, subject to the approval of the Executive Board.

- **Healthcare Workgroup:** This workgroup meets bi-monthly to discuss state and federal legislation and issues impacting healthcare access and affordability for RPEC members. The workgroup makes policy and legislative recommendations to the statewide Legislative Committee. The workgroup also works with the Council Office to coordinate testimony for meetings of the Public Employees Benefits Board (PEBB) and on relevant legislation during the legislative session.
- **Pension Policy Workgroup:** This workgroup meets on an as-needed basis to research issues pertaining to Washington State's pension plans. The workgroup makes policy and legislative recommendations to the statewide Legislative Committee. The workgroup also works with the Council Office to coordinate testimony for meetings of the Select Committee on Pension Policy.
- **Policy Review Workgroup:** This workgroup reviews existing policies to ensure all policies and procedures that pertain to the Executive Board, districts and chapters have been routinely reviewed and updated, as needed. Recommendations on new policies or changes to existing policies are made to the statewide Executive Committee. Recommendations on fiscal-related policies are made to both the Finance Committee and Executive Committee. New or revised policies, once reviewed by the appropriate committees, are subject to the approval of the Executive Board.

Acronyms

COLA: Cost-of-living adjustment

DRS: Department of Retirement Systems

HCA: Health Care Authority

Legislation:

- **ESSB:** Engrossed Substitute Senate Bill
- **HB:** House Bill
- **RCW:** Revised Code of Washington
- **SB:** Senate Bill
- **SJM:** Senate Joint Memorial
- **SSB:** Substitute Senate Bill

OIC: Office of the Insurance Commissioner

PEBB: Public Employees Benefits Board

Pension Plans (administered by DRS):

- **LEOFF:** Law Enforcement Officers and Fire Fighters Retirement System
- **PERS:** Public Employees Retirement System
- **Plan 1:** PERS or TRS
- **Plan 2:** PERS, TRS, SERS, PSERS
- **Plan 3:** PERS, TRS, SERS
- **PSERS:** Public Safety Employees Retirement System
- **SERS:** School Employees Retirement System
- **TRS:** Teachers Retirement System

SCPP: Select Committee on Pension Policy

SEBB: School Employees Benefits Board

SHIBA: Statewide Health Insurance Benefits Advisors

WSIB: Washington State Investment Board



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Affiliated Organizations

AFL-CIO or AFLCIO: American Federation of Labor and Congress of Industrial Organizations is a national organization of labor unions. <https://aflcio.org/>

AFSCME: American Federation of State, County, and Municipal Employees is the largest public sector union in the country. RPEC is Chapter 10 of AFSCME Retirees. <https://afscme.org/>

ARA: Alliance for Retired Americans is the AFL-CIO's retiree organization. It is a coalition of both union and non-union retiree groups that work at the federal level. <https://retiredamericans.org/>

WEA: Washington Education Association is a union representing public school teachers in Washington State. RPEC works with their retiree organization (WEA-Retired) on issues that impact both memberships. <https://www.washingtonea.org/>

WFSE: Washington Federation of State Employees, AFSCME Council 28, is a public sector union representing active state employees in Washington. RPEC works closely with WFSE on issues impacting current and future retirees. <https://www.wfse.org/>

Council 2: Washington State Council of County and City Employees - AFSCME Council 2 is a public sector union representing City and County employees. RPEC works closely with Council 2 on issues impacting current and future retirees. <https://council2.com/>

Senior Lobby: Washington State Senior Citizen's Lobby is a coalition of senior service organizations, retiree groups, and care providers that advocate for legislation that benefits seniors. Several RPEC members serve on the Senior Lobby Executive Board. <https://waseniorlobby.org/>

WSLC: Washington State Labor Council, AFL-CIO is the Washington State AFL-CIO chapter. RPEC is a member and receives three delegates to their Conventions and Political Endorsement Conferences. <https://www.wslc.org/>

WSARA: Washington State Alliance for Retired Americans, the ARA chapter for the State of Washington, works to advocate for both public and private sector retirees. The RPEC Executive Director serves on the WSARA Executive Board. <https://washington.retiredamericans.org/>

WSSRA: Washington State School Retirees Association promotes the interests of retired and active school employees. RPEC and WEA work with WSSRA whenever possible. <https://wssra.org/>

PSARA: Puget Sound Advocates for Retirement Action works across generations for social justice, economic security, dignity, and a healthy planet. RPEC largely partners with PSARA to safeguard healthcare benefits. PSARA is also a member of the Public Employees Benefits Board Stakeholders' Medicare Coalition. <https://www.psara.org/>



Getting Started with Zoom

How to join a meeting:

1. Click the invite link provided by the host, for example in a calendar or email invitation, and follow the on-screen instructions.
2. Alternatively, open the Zoom desktop client or application.
3. Click the **Home** tab .
4. Click the **Join** icon .
5. Enter the meeting ID provided by the meeting host.
6. If prompted, enter the meeting passcode.
7. Click **Join**.

You will then join the meeting or waiting room, if enabled by the host.

How to connect to audio:

Upon joining the meeting, you will be prompted to connect to audio.

1. Click **Join with Computer Audio**.
2. Click **Mute / Unmute** in the bottom-left corner of the meeting controls toolbar as needed to control your microphone.
3. (Optional) Next to **Mute / Unmute**, click the up-arrow icon  to change any of your audio settings, such as your microphone or speaker selection.

How to turn on your video and add a virtual background:

1. If the host has requested video be on by default, you will be prompted with a video preview. This allows you to see your current video and decide to join the webinar/meeting with or without video. Click **Join with Video**.
2. While you're in a meeting, click **Start Video / Stop Video** in the bottom-left corner of the meeting controls toolbar as needed to control your video.
3. (Optional) Next to **Start Video / Stop Video**, click the up-arrow icon  to change any of your video settings, such as picking a different camera or choosing a virtual background. If you select a new background, it will automatically change in the meeting.

How to chat with others:

1. In the meeting controls toolbar, click the **Chat** icon.
The Chat panel will open.
2. Click in the text input box and enter your message.

3. Click the **To:** drop-down menu to select who you want to send your message to.
Note: Your available options may be restricted by the host.
4. Press **Enter** or click the send icon  to send your message.

How to raise your hand:

1. In the meeting/webinar controls, click **Reactions** , then click **Raise Hand** .
The host will be notified that you've raised your hand.
If the host allows you to talk, you may be prompted to unmute yourself. While unmuted, your profile picture and name are displayed to the host and panelists. Only your name is displayed to other attendees.
2. In the meeting/webinar controls, click **Lower Hand** to lower it, if needed.
This will not mute yourself if you are unmuted.

Retrieved from Zoom Support: https://support.zoom.com/hc/en/getting-started-with-meetings?id=zoom_meetings_guide

HYBRID MEETING TIPS

The following provides suggestions on equipment and set-up to successfully run a hybrid live & virtual meeting using Zoom.

There is more than one way to do most things, including a hybrid meeting. If your chapter is having success with other approaches, please share them.

Equipment (Needed)

- Reliable **high-speed internet connection (Wi-Fi)** at the live meeting location.
- A **laptop computer** (it is possible to do this with a tablet, but using a laptop gives the meeting host person better ability to manage the meeting experience).
 - Laptop – should be logged on to the host Zoom account and will provide interaction between the virtual attendees and live attendees. Will also relay questions/comments from the virtual attendees.
- A **smartphone** to video the live attendees/speakers at the meeting.
 - Smartphone – should be logged on to a Zoom account other than the host and will be aimed at the live attendees/speakers.
- A **tripod** (floor or table-top) so you can have the smartphone or camera at eye level and can easily pan the camera when needed to include members in the frame when they are speaking.

Equipment (Optional)

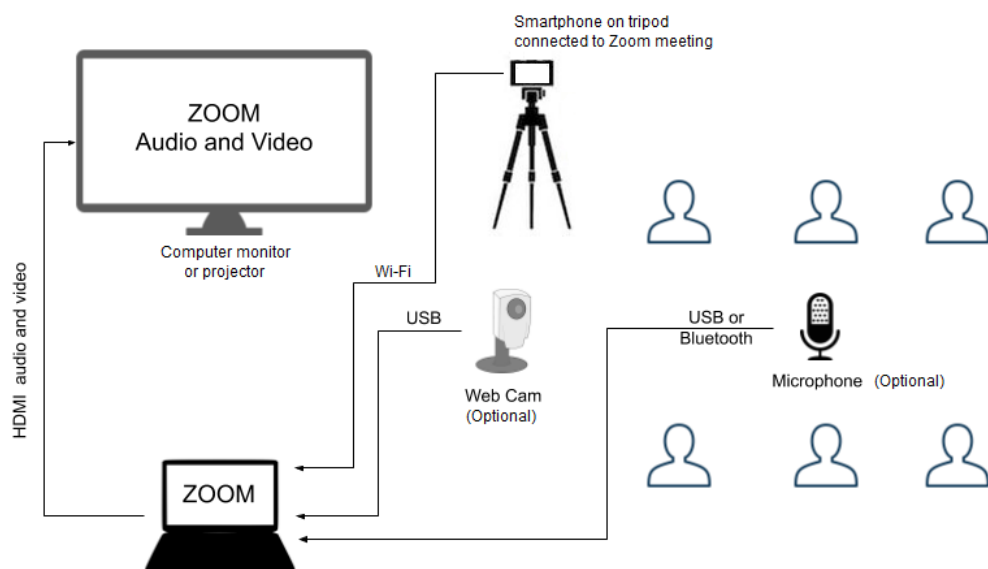
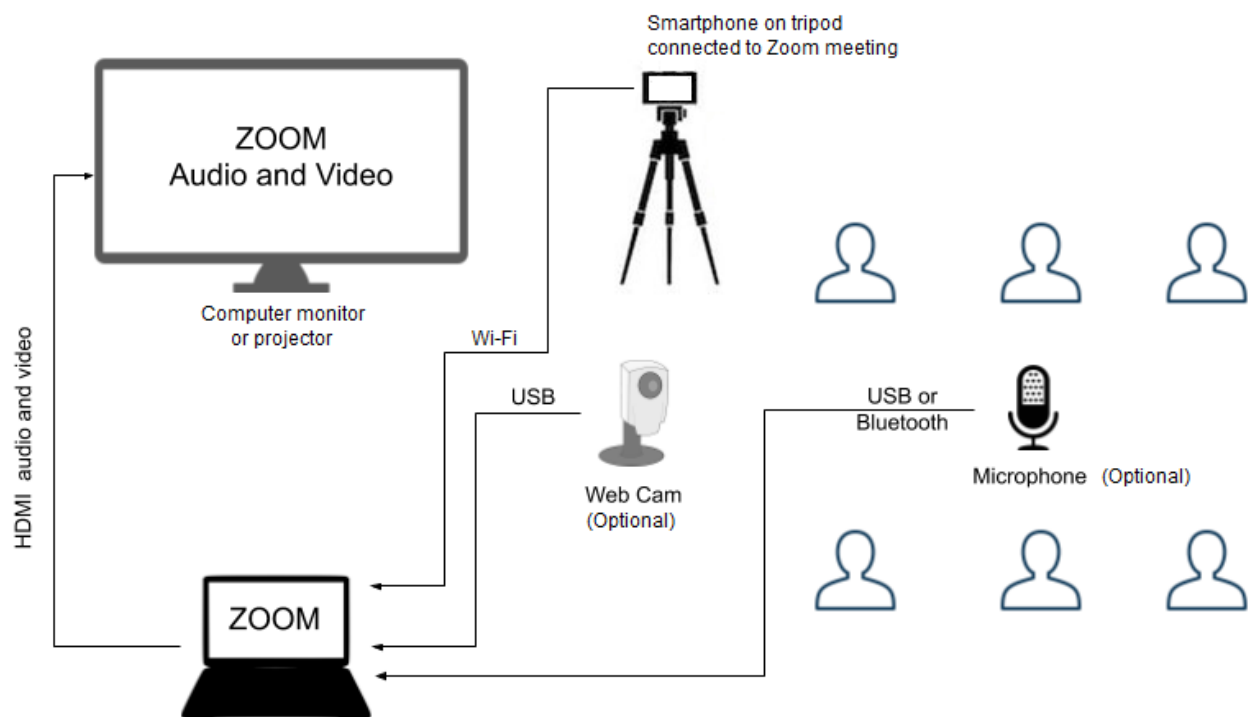
- An **external camera** with microphone.
- A **USB extension cord** might prove useful so that you can set up the camera more than a few short feet from the laptop.
- A **computer monitor or projector** at your location that can connect to your laptop, for projecting your laptop screen in the live meeting.
- An **external speaker** that is loud enough for the live room to hear audio playing over your laptop. If you connect to a monitor or projector with speakers, you should not need another external speaker.

Miscellaneous

- A **meeting technician (Zoom host)** at the meeting who is familiar with Zoom host controls.
 - Monitoring participants
 - renaming participants
 - muting when necessary
 - monitoring chat and raised hands
 - toggling between gallery view and speaker view
 - Screen sharing (if necessary)
 - Understands how to connect camera, projector or monitor, and external speaker (if needed) to the laptop

Meeting Setup

- Connect the laptop to the monitor or projector. Make sure the monitor or screen can be seen by live meeting attendees.
- Camera: Position camera so it has a good angle on the podium or featured speakers and can pan when needed to feature live attendees when they are speaking.
 - Connect the smartphone to the tripod and logon to Zoom meeting and enable video and audio.
 - -Or- Connect the camera to tripod and laptop.
- During most of meeting, show virtual attendees in gallery view on the screen or monitor. Mute all participants except yourself (you need to be unmuted so that virtual attendees will hear the activity in the live meeting).
- Have participant and chat panels open during the meeting. Instruct virtual participants to raise their hand or send you a chat message when they wish to speak.
- To enable a virtual participant to speak, instruct them to unmute themselves and let the live audience know they will be speaking. Switch to speaker view when they are speaking. After they have spoken, mute them again and return to gallery view.
- During meeting, if live attendees are speaking and not in view of camera, pan the camera as needed to get them in view. Try to keep camera movements smooth and steady, not jerky.
- Tip: Before your first meeting, do a practice meeting with a few people in the live room and a few people attending virtually.



All-In-One Conference Systems

Owl Labs Meeting Owl 3 Conference Webcam: \$1,049

https://owllabs.com/products/meeting-owl-3?utm_source=google&utm_campaign=US_Branded_RLSA+Campaign&utm_medium=cpc&utm_term=owl%20labs&hsa_kw=owl%20labs&hsa_mt=p&hsa_tgt=aud-410914543904:kwd-359152180989&hsa_src=g&hsa_ad=617179448379&hsa_ver=3&hsa_cam=8548498497&hsa_net=adwords&hsa_acc=2493962266&hsa_grp=89870277722&cq_cmp=8548498497&cq_con=89870277722&cq_plac=&cq_net=g&cq_plt=gp&gad_source=1&gclid=Cj0KCQjwxeyxBhC7ARIsAC7dS3-lqvvU2kccitFq4P1yK2uJf-5JSc8jN81LppiwwJPw7ehvkAh1z5laAoqrEALw_wcB

ALTERNATIVE

Toucan Video Conference System 360: \$399.99

<https://www.toucan-solution.com/products/sc360>

Other Equipment Needed

- TV/Projector to view virtual participants (ideally, the meeting location would have this)
- Laptop
- HDMI cable

Optional Equipment

- Additional microphones (dependent on group size)

Robert's Rules of Order

Every Motion Has 6 Steps:

1. **Motion:** A member rises or raises a hand to signal the chairperson.
2. **Second:** Another member seconds the motion.
3. **Restate motion:** The chairperson restates the motion.
4. **Debate:** The members debate the motion.
5. **Vote:** The chairperson restates the motion, and then first asks for affirmative votes, and then negative votes.
6. **Announce the vote:** The chairperson announces the result of the vote and any instructions.

Requesting Points of Something

Certain situations need attention during the meeting, but they don't require a motion, second, debate or voting.

- **Point of Order:** Draws attention to a breach of rules, improper procedure, breach of established practices, etc.
- **Point of Information:** A member may need to bring up an additional point or additional information (in the form of a nondebatable statement) so that the other members can make fully informed votes.
- **Point of Inquiry:** A member may use point of inquiry to ask for clarification in a report to make better voting decisions.
- **Point of Personal Privilege:** A member may use point of personal privilege to address the physical comfort of the setting such as temperature or noise. Members may also use it to address the accuracy of published reports or the accuracy of a member's conduct.

TIPS AND REMINDERS FOR CHAIRPERSONS

- Follow the agenda to keep the group moving toward its goals.
- Let the group do its own work; don't over command.
- Control the flow of the meeting by recognizing members who ask to speak.
- Let all members speak once before allowing anyone to speak a second time.
- When discussions get off-track, gently guide the group back to the agenda.
- Model courtesy and respect and insist that others do the same.
- Help to develop the member's skills in parliamentary procedure by properly using motions and points of order.
- Give each speaker your undivided attention.
- Keep an emotional pulse on the discussions.
- Allow a consensus to have the final authority of the group.

Robert's Rules of Order Motions Cheat Sheet

What Do I Say?

To Do This	Motion	You Say This	Debate Allowed?	Vote Required?
Introduce Business	Main	"I move that ..."	Yes	Majority
Second a Motion	Second	"Second!"	No	No
Change the Wording or add Clarity to a Motion	Amend	"I move to amend the motion by ..." (adding words; striking out words; substitute words)	Yes	Majority
Send to Committee	Commit/Refer	"I move the motion be referred to ..."	Yes	Majority
Postpone Action until a Specific Time	Postpone	"I move the motion be postponed until ..." (provide a specific time on the agenda or next meeting date"	Yes	Majority
Postpone Action until an Unspecified Time (a motion will be required to discuss in the future)	Lay on the Table	"I move to lay the motion on the table."	No	Majority
Limit Debate	Limit Debate	"I move that the debate on this motion be limited to (one) speech of (two) minutes for each member."	No	Two-Thirds
End Debate or Request a Vote	Limit Debate	"I move the previous question."	No	Two-Thirds
Take Intermission	Recess	"I move to recess for (time)."	No	Majority
Close Meeting	Adjourn	"I move to adjourn."	No	Majority



RETIRED PUBLIC EMPLOYEES COUNCIL OF WASHINGTON

Resources Available to Chapters

Chapter Reports & Schedule:

- Adds, Drops & Changes Report - monthly
- Chapter Roster - quarterly
- Chapter Alpha List by Legislative District - available upon request
- Chapter Alpha List by Member - quarterly
- Chapter Robocall List - produced monthly
- Chapter Email List - produced upon request
- Specialized Chapter Lists - produced upon request

Current Literature/Publications:

- RPEC Chapter Information (chapter meeting locations, dates, times)
- Chapter Newsletters - produced upon request
- RPEC Today! Quarterly Newsletter
- RPEC Districts Map
- RPEC Organizational Charts
- RPEC Legislative Priorities
- Twelve Tips on How to Communicate with Lawmakers
- PERS 1 COLA Fact Sheet
- Benefit Payments to DRS Annuitants in WA Flyer
- Roberts Rules of Order Cheat Sheet
- Getting Started with Zoom Guide
- Hybrid Meeting Tips & Equipment

Recruitment:

- 10 Good Reasons to Join RPEC of WA Brochure
- RPEC's Significant Accomplishments Handout
- Membership Application forms
- Retiree Membership Application flyers
- Associate Membership Application flyers

Member Benefits (useful for recruitment):

- AFSCME Advantage Discounts & Savings Brochure - "The Benefits of Solidarity"
- BrightNow! Dental brochure
- TruHearing Benefits brochure

Forms, Templates, & Samples:

- Chapter Elections Report form
- RPEC Expense Reimbursement form
- RPEC Political Action Committee (PAC) Contribution forms
- RPEC Meeting Sign-In sheets
- Meeting Agenda & Minutes templates

- Sample Chapter Membership Plan Outline
- Sample New Member Retention & Engagement Plan
- New Member Retention & Engagement Plan Checklist & Template
- Member Profile (succession planning)

Promotional Items (as available):

- RPEC Lapel Pins
- RPEC Logo Ink Pens - free
- RPEC Note Pads (8.25" x 5.5")
- Assorted items with RPEC logo (e.g. magnets, stickers, buttons, chip clips)- free
- RPEC Padded Folio w/ Legal Pad
- RPEC Pop-Up Banner
- RPEC Tablecloth
- RPEC Wall Banner



Potential Chapter Programming & Retiree Resources

Reports/Programming from RPEC:

Many RPEC members, particularly those without digital access, only receive information about RPEC at chapter meetings and through the chapter and Council's newsletters. Chapter meeting agendas can be structured to include one or more of the following items, which can be presented by other RPEC members.

Membership

Update on the chapter's membership statistics, and/or RPEC's membership statistics. Reports can also be made on efforts underway with the chapter's membership recruitment, retention and engagement plans.

Financial Statements (Treasurer's Reports)

Monthly financial reports are required per AFSCME's Financial Standards Code – Article IX, Reporting. "A monthly financial statement must be prepared at the end of each month [...] Regular financial reports must be made to the Executive Board and to the membership."

Chapter Committee/Committee Chairpersons

Update on the chapter committees' activities. Chapter committee chairpersons can also attend standing committee meetings and/or reach out to state committee members/chairs to exchange information about local and statewide priorities and activities.

Central Labor Council (CLC) Delegates

CLC delegates keep RPEC visible with local unions. They can report on the action items/priorities discussed at recent labor meetings and discuss their RPEC recruitment efforts.

Events

Promote and encourage participation in upcoming RPEC events. Consider carving out time to assist members with registration. Following events, a chapter member who participated can report back to the chapter.

Repurposing Existing Content

The RPEC website has a wealth of educational programming, including informational articles, recordings of past webinars, and episodes of *RPEC On Air*, RPEC's podcast.

RPEC Executive Board

Provide an update on the most recent Executive Board meeting. This could be done by your District Representative(s), a member of the chapter who attended the meeting, or by simply reviewing the minutes. District Representative(s) can also present about RPEC's Strategic Plan and other statewide activities and priorities.

RPEC Committees/Workgroups

The members of the statewide Committees and Workgroups can provide information and updates on their activities. Alternatively, a member of the chapter who attended a recent committee or workgroup meeting can provide the report.

Other Potential Guest Speakers & Retiree Resources:

State and Federal Legislators

To find your legislative district & legislators, visit <https://app.leg.wa.gov/districtfinder/> and input your address. Once inputted, select "Find My District." A list of your state and congressional legislators will appear on the left. Click on their names to see their contact information. It is highly recommended to meet with your legislators during the legislative interim session to build rapport and communicate RPEC's priorities.

Secretary of State

Phone: 360-902-4180

Email: elections@sos.wa.gov

Election information: <https://www.sos.wa.gov/elections/>

Topics: state and local elections; initiatives and referendums; state voter's pamphlet & election notice; historical records of the state; international trade & cultural missions.

State Attorney General's Office

Phone: 360-753-6200

Website: <https://www.atg.wa.gov/>

Topics: senior fraud; charity scams; home improvement schemes; identity theft; internet scams; investment scams; living trusts scams; sweepstakes scams; travel scams; internet safety for seniors; dealing with death; Medicaid fraud; prescription drug prices; and vulnerable adult abuse.

Office of the Governor

Phone: 360-902-4111

Website: <https://governor.wa.gov/>

Topics: health care; federal health care reform; applying for a board or commission; and community volunteering.

Washington State Department of Retirement Systems (DRS)

Phone: 360-664-7000

Website: <https://www.drs.wa.gov/>

Topics: benefit payment schedule; retiree organizations; and retirement resources.

Social Security Administration

National phone number: 1-800-772-1213

Website: <https://www.ssa.gov/>

Steve Kofahl, a member of AFGE and a retiree from the Social Security Administration, is often available at stevekofahl@aol.com.

Washington State Investment Board (WSIB)

Phone: 360-956-4600

Website: <https://www.sib.wa.gov/>

Topics: investment overview; fund performance; and investment reports.

Yona Makowski, RPEC Chapter 2, is currently the WSIB Vice-Chair.

Washington State Health Care Authority (HCA)

Phone: 844-461-4436

Website: <https://www.hca.wa.gov/>

Topics: public employee/retiree benefits; prescription drug assistance; agency programs; and basic health.

Public Employees Benefits Board (PEBB)

Phone: 360-725-9400

Email: pebboard@hca.wa.gov

Topics: Medicare; enrollment; retiree life; and dependent care.

Elyette Weinstein, RPEC Chapter 18, is a voting member on the PEB Board.

Washington Department of Health

Phone: 360-236-4501

Website: <https://doh.wa.gov/>

Topics: ordering certificates (birth, death, marriage, divorce); health data; provider credential search (health care provider, facility, publications); aging; Death with Dignity Act; diabetes prevention & control; and stroke & cardiac emergency care.

Office of the Insurance Commissioner (OIC)

Phone: 800-562-6900

Website: <https://www.insurance.wa.gov/>

Topics: health care reform; early retiree coverage; tools to compare health care facilities; homeowners' insurance; Statewide Health Insurance Benefits Advisors (SHIBA); filing complaints against your insurance company; compare insurers by complaints; COBRA subsidy; health care coverage options and rights; Medicare; Medicare Part D; Medicare fraud and abuse; long-term care; health care coverage speakers; and social service agency & advocacy group resources.

Senior Lobby

Phone: 360-754-0207

Website: <https://waseniorlobby.org/>

Topics: senior advocacy; ethics; fraud & abuse; health care; housing; judiciary; long-term care & disabilities; retirement & pensions; and wellness & safety. Website has a multitude of resources for seniors. Several RPEC members serve on the Senior Lobby's executive board.

Washington Wellness

Phone: 360-725-1700

Website: <https://tinyurl.com/yec4sb3n>

Topics: health risk assessment; benefits to care for your health; and fitness club discount program.

Washington Association of Area Agencies on Aging (AAA)

Phone: 1-855-567-0252

Website: <https://www.agingwashington.org/>

Topics: promoting dignified, independent living for older adults and adults with disabilities; and homecare solutions.

Aging & Long-Term Care of Eastern Washington

Phone: 509-458-2509

Website: <https://www.altcew.org/>

Topics: promoting well-being, independence, dignity, and choice for all older persons and for individuals needing long term care in Ferry, Stevens, Pend Oreille, Spokane, and Whitman Counties.

1st CHOICE Advisory Senior Referral Services

Phone: 800-361-0138

Website: <https://www.choiceadvisory.com/>

Topics: free referrals for senior housing, senior care, and in-home care; retirement & assisted living; memory care; and adult care homes.

Elder Law Specialist James M. Brown

Phone: 360-532-8380

Website: <http://www.pkblaw.com/jamesmbrown.html>

Topics: educating seniors of their rights (does not solicit); elder law; estate planning; probates; and guardianships.

Northwest Health Law Advocates (NoHLA)

Phone: 206-325-6464

Website: <https://nohla.org/>

Topics: refining & improving health reform; advocating for easier access to Medicaid; health care justice; and universal, equitable, affordable health care access for Washington state residents.

King County Assessor's Office

Phone: 206-296-7300

Website: <https://kingcounty.gov/depts/assessor.aspx>

Topics: property tax exemptions for seniors, persons with disabilities, and disabled veterans; aging programs; and transportation programs for seniors.

Low-income Home Energy Assistance Program (LIHEAP)

Phone: 360-725-2857

Email: liheap@commerce.wa.gov

Topics: helping low-income households maintain affordable & dependable utility services to avoid disconnection.

Washington Department of Veterans Affairs

Phone: 1-800-562-2308

Website: <https://www.dva.wa.gov/>

Topics: housing benefits; financial assistance benefits; veterans' license plates; reduced hunting & fishing licenses; special health care services; and volunteering or donating.

Other Suggestions from Your Local Communities:

- | | |
|---|---|
| ✓ Senior and Community Services | ✓ Hospitals |
| ✓ The Better Business Bureau | ✓ Local colleges and universities |
| ✓ Humane Society | ✓ Red Cross |
| ✓ Fire Department (EMT's discuss lifelines & other senior issues) | ✓ Assisted Living Centers and Nursing Homes |
| ✓ County Assessment Office | ✓ Medicare Specialists |
| ✓ Rehabilitation Services | ✓ County Election Commission |
| ✓ Estate Planners | ✓ Public Health and Services Agency |
| ✓ Financial Planning Consultants and Services Banks | ✓ Volunteer organizations |