

Strategic Plan



2023-2027

Approved by the RPEC Executive Board on 11/13/2023

Mission

To unite retired public employees for their mutual benefit and welfare. We do this by promoting legislation to improve financial and medical benefits, providing information to, and otherwise supporting members, and working closely with other organizations.

Acknowledgements

This draft strategic plan represents nine months of research and work on behalf of not only the Executive Board and the Council Office professional team, but also a host of valued colleagues from AFSCME Retirees, AFSCME's Education Division, and AFSCME's Research Department. First, we thank Ann Widger, AFSCME Retirees Executive Director, for her generous support of this effort through her allocation of staff time, resources, and expertise. We offer heartfelt thanks for the expertise and service of Susan Crumpton, who, along with Ben Hodapp and Carlos Lopez, guided the strategic planning process, research efforts, and Executive Board work sessions. We offer deep appreciation for Terri Brady, Emily Bateman and Kayce Reed who worked behind the scenes on many facets of the strategic planning process and served as facilitators of the all-member virtual listening session. We thank our Executive Board, cited below, for their leadership and insights, and the Executive Committee for the extra time and effort they put into ensuring the success of the strategic planning process. Finally, we acknowledge the contributions of RPEC's professional team, including Laurie Weidner, Derek VanSpoor, Jakob Canup, Alissa Brady, and Emmett Mills. Thank you all for your countless hours of planning and preparation, creative thinking, and shared vision for the future of RPEC.

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Situation Analysis

RPEC has enjoyed many decades of legislative advocacy success. The organization is respected by state legislators and has consistently delivered on its promises to members – to fight to protect retirement security for public sector retirees.

Overall Membership Trends

The organization has grown exponentially in the last five years through intentional and new efforts, including a series of successful blind mailings to potential new members. The 2023 blind mailing, the most successful to date, brought in 1,626 new members. However, this growth is deceiving. Each year, RPEC loses upwards of 800 plus members due to death and membership drops. Thus, while our membership is increasing, it is only increasing marginally. (See Appendix).

Most respondents to the blind mailing are Plans 1 retirees. Roughly 55 percent of RPEC's membership is composed of Plans 1 retirees. Yet, this pool of potential members is shrinking, as the average age of Plans 1 retirees is 78. The greater potential market share for RPEC, moving forward, is with Plans 2 and 3 retirees. Efforts must be made to address the information and engagement priorities of these retirees for the long-term stability of the organization while continuing to meet the needs of older members.

Dwindling Chapter Meeting Attendance

Since the onset of the worldwide pandemic in 2020, RPEC has undergone considerable changes. The Executive Board, as early as 2019, had approved virtual meeting options. To the credit of the organization's internal professional team, RPEC adapted quickly to meeting virtually through Zoom. This transition allowed the Council Office and chapters to continue to engage members in legislative advocacy priorities. Even with that successful transition, seniors continue to be reluctant to attend in-person meetings even though the Center for Disease Control has indicated it is safe to do so. Since 2022, RPEC chapters have struggled to attract members to in-person meetings, with most chapters averaging 10-12 attendees per meeting. Whereas prior to the pandemic, these meetings were attended by 20-40 members for smaller chapters and upwards of 50-60 attendees at large chapter meetings.

In response to dwindling chapter meeting attendance and to help chapter leaders boost member attendance and engagement, RPEC's professional team developed a series of monthly virtual Leadership Calls to provide tips and strategies to chapter leaders to boost attendance and improve engagement. The monthly Leadership Calls have also been a forum through which leaders can share best practices with peers. Unfortunately, despite heavy promotion by the Council Office, attendance has ranged from 10-38 out of a possible 120 chapter officers statewide. Proactive engagement by even our chapter officers also has been a persistent challenge.

Many chapter presidents have worked tirelessly to schedule relevant, interesting programming to boost attendance. When programming alone wasn't working, chapters responded to the dwindling attendance by offering financial incentives. Many chapters now are paying for lunch for all their members, or they significantly underwrite the cost for each

member's lunch. One chapter, for instance, has its members pay \$5 for lunch (new members are free for the first meeting) and the chapter picks up the additional \$15 plus dollars per attendee. Given the fiduciary responsibilities of the Executive Board and Executive Director, it is our responsibility to consider if this is the best use of RPEC membership dues – to underwrite or fully cover the cost of lunch for only a handful of members, many of whom are already active and regularly attend chapter meetings.

Other chapters are providing gift card drawings of \$25-100 per meeting to incentivize attendance. One large chapter is offering a \$500 drawing. Again, we must ask if this is the best use of member dues, or if these resources could be directed elsewhere to accomplish the organization's mission.

Dwindling in-person meeting attendance is a nationwide trend, according to Ben Hodapp, Associate Director of AFSCME Retirees. This trend is so widespread that AFSCME Retiree chapters around the nation are rethinking their per capita allocations and service models in response to the demographic changes in their membership base (younger retirees, emerging majority of female retirees) and changing member engagement patterns. Furthermore, COVID cases are again on the rise. If the attendance issues of the past three years are predictive, RPEC can anticipate continued member participation issues and may need to re-evaluate the chapter structure to explore additional ways of engaging members.

Inactive and at-risk chapters

RPEC has always had chapters that, at times, struggle to achieve adequate attendance and engagement at meetings, or are faced with an aging leadership that cannot, or will not, step down for others to step up. In the last 20 plus years, the number of chapters has decreased from 42 to 30. And, of the 30, only 23 are functioning to some degree, meaning that they have an incomplete slate of officers, aging officers with no succession plan, do not hold or only occasionally hold meetings, do not produce a newsletter on a regular schedule, and/or have not sent delegates to the biennial Convention.

Members in chapters that are inactive or without leadership face a lack of engagement aside from printed Quarterly Newsletters from the Council or mass emails (if they have email addresses). Members that are not engaged on a regular basis and made to feel involved will tend to question their purpose for or value of membership and will eventually leave the organization.

RPEC Leader Participation, Elections, and Engagement

RPEC leader engagement has also changed in recent years with a greater focus on digital participation and engagement. Fortunately, RPEC continues to draw upon a base of committed leaders who are proactive and willing to step in to lead and support important initiatives. For the organization's long-term stability, this core group must grow and expand to include more Plans 2 and 3 retirees.

At a chapter level, most chapters have at least one executive officer vacancy. Some chapter presidents, who have served the organization for years, want to step down but they continue to serve because no one is positioned to replace them. Succession planning is vital

to the future of the organization and chapter stability, and it is a missing element of RPEC's infrastructure.

A key focal point of member engagement is ensuring that all chapters send a respectable slate of delegates to the biennial Convention (this is the primary focus for chapter funding). Despite Council Office efforts to raise the importance of this event and to provide financial support for smaller chapters to send delegates, attendance at Convention declined because of the worldwide pandemic. Safety protocols were in place at the 2022 Convention, but the prevalence of Covid-19 impacted attendance.

Finally, as noted above, leader participation in the monthly virtual Leadership Calls has averaged less than 10%. The one-hour informational calls and brainstorming sessions were designed to help leaders build and engage chapter membership. Attendance at virtual standing committee meetings is also lower than in past years. The standing committee meetings, as well as the virtual Leadership Calls, are opportunities for chapter leaders, particularly those with meeting attendance challenges, to share best practices and ask for additional assistance from the Executive Board and Council.

Leadership Training in past years has been respectably attended, but never with a majority of leaders. In 2023, a "hard press" by Executive Board members on chapter leaders was necessary to encourage attendance. Attendance in 2023 was still less than half of the 120 available chapter leaders. The professional team at the Council Office works extensively to provide informative and fresh content and tools to help make the chapter leaders successful in meetings, member engagement, recruitment, and retention. However, the lack of attendance at these trainings and pushback on duties to the Council Office are problematic and concerning.

Moving forward, the organization must identify ways to motivate, train, and engage chapter leaders, as they are critical to member recruitment, retention, engagement, and advocacy.

Member Legislative Engagement

While in-person attendance at chapter meetings is dwindling, virtual engagement, with support provided by the Council Office team, is growing exponentially.

During the legislative session, the weekly virtual Legislative Update calls are attended by an average of 30-40 members. Special topical forums, like the first RPEC Speakers Series, were attended by nearly 50 members, including new members and those from out-of-state.

Digital participation in legislative advocacy is also on the rise. During the 2023 legislative session, through the RPEC e-blasts and chapter president outreach, more than 1,200 retirees (most of whom were RPEC members) signed in PRO on RPEC's priority bills. The research, conducted in support of the development of this strategic plan, underscores that members appreciate opportunities to engage, especially when the action requested is easy to perform and not time intensive.

Using ActionNetwork for federal legislative advocacy, RPEC garnered 500 member outreaches to Washington's Congressional Delegation within three weeks.

In addition, both virtual and in-person Legislative Day attendance counts have fluctuated between 2020 and 2023. Legislative Day in 2020, the last in-person event before the start of the pandemic, had a final attendance count of 135 out of the 169 who had registered. In 2021 and 2022, Legislative Day was held virtually, with considerably less registrants than pre-pandemic years with an average of 85 actual attendees. The lower attendance numbers could be attributed to technological barriers (lack of access to updated hardware or software, limited ability, access to high-speed internet, etc.). Legislative Day was, once again, held in-person in Olympia in 2023, and 100 out of 129 registered RPEC members attended. While the pandemic has had an impact on final attendance numbers, members still show that they especially value opportunities to amplify their voices and speak face-to-face with their elected officials.

Thus, members continue to engage with RPEC in support of its Legislative Priorities. Exploring more opportunities for legislative engagement may strengthen recruitment, retention and engagement among members vested in all retirement plans.

Member Digital Engagement

The weekly digital NewsFlash through our ActionNetwork platform, which is sent to roughly 6,000 RPEC members with emails, has a 40% email open rate while the average industry email open rate is less than 10%. The click-through rate on news articles and links runs only at about 2%, but again, is above the industry averages.

Mass emails using ActionNetwork are our most valuable, cost-effective, and consistent means of communications with a majority of members. The platform facilitates targeted mailings, such as by geographical locations, by legislative or Congressional districts, by chapters, etc. The platform also allows RPEC to produce messaging to lawmakers that is consistent and aligned with the Legislative Priorities.

Our Facebook page engagement continues to increase, as well as the amount of content posted. Through continued engagement, posting, and advertising, the reach of the RPEC Facebook page will continue to expand as a viable tool to reach computer-savvy potential members and increase public visibility.

In short, member engagement through the Council Office's digital tools and outreach continues to grow, with more growth anticipated due to changing member demographics.

At a chapter level, officers support the Council Office's digital engagement through email outreach to members and by actively mobilizing members who attend chapter meetings. Given the reach of digital engagement and its ability to engage members quickly and easily, chapter leader participation in these efforts will become even more important in the years ahead to sustain and build engagement. Training and support must be provided to ensure chapter leaders continue to effectively use email and other mobilization tools.

Strategic Planning Process

The RPEC Executive Board embarked on the strategic planning process in early spring 2023, under the guidance of leaders from AFSCME's Education Division and AFSCME Retirees and RPEC's Executive Committee and Executive Director. The first step of the strategic planning process, as approved by the Executive Board at the February 2023 meeting, was to gather input from members to help inform the structuring of organizational goals and priorities. AFSCME Retirees, with insights from RPEC's professional team, crafted and implemented a scientific phone poll and distributed a detailed written survey to all members. All survey findings are included in the Appendix. In addition, AFSCME and our professional team led an all-member virtual listening session. The Executive Board convened in two multi-day work sessions to identify the strategic plan priorities based on member feedback. The Executive Board identified four goal areas pertaining to membership recruitment, retention and engagement, strategic communications, and federal advocacy. An additional goal was added to support organizational stability to fuel completion of the strategic plan goals and support the organization's mission. The strategic plan has been devised to guide RPEC from fall 2023 through fall 2027.

Summary of key learnings from member research

- All respondents had similar priorities with one exception. Plans 2/3 members favor RPEC expanding involvement in protecting Federal benefits while Plans 1 members prioritize the restoration of an on-going cost-of-living adjustment.
- All members value the Council Office's informational resources, advocacy, and political action efforts.
- Retirees vested in Plans 1 outnumbered those in Plans 2/3 in responding to the telephone poll and written survey. Therefore, AFSCME Retirees noted that this dynamic may have skewed some of the research results.
- In addition to meeting the information needs of older retirees, the organization must also take steps to reach and engage younger retirees. The market growth potential for RPEC, moving forward, is with retirees, age 50 and above, who are vested in Plans 2 and 3.
- RPEC members, the majority of whom are vested in Plans 1, value the printed membership newsletter and email communications.
- The Council Office must enhance and promote the website as the organization's key communications and information tool for current and potential members.
- Facebook is the predominant social media channel used by RPEC members.

Goal: Organizational Sustainability

By January 2027, create the foundation for sustained organizational capacity and the successful implementation of the strategic plan by making data-based decisions and investments.

Strategy

Restructure the operating budget and initiate processes and procedures to support organizational sustainability and attainment of the strategic plan goals.

Strengthen the capacity of RPEC by working with allies such as AFSCME Affiliates, Central Labor Councils and Washington State Labor Council, supporting one another's programs and activities where our interests align.

Tactics

2023

Executive Board

- Align the operating budget expenditures and investments with the strategic plan goals.
- Evaluate existing expenditures to potentially redirect resources to support strategic plan priorities.
- Reduce the deficit through prudent and responsible decision-making.
- Make strategic investments to support membership recruitment, retention, engagement, and advocacy.
- Make strategic investments to ensure RPEC's professional team is properly resourced and has the knowledge and skills to support successful implementation of the strategic plan.
- Expect every chapter to produce an annual operating budget aligned with RPEC's priorities. Operating budgets will be submitted to the Council Office by May 2024. Standardize this as a standing chapter requirement.

Council Office

- Develop and reinforce policies, practices and procedures that support organizational sustainability.
- Schedule initial chapter regional trainings for spring 2024 with support from the District Representative(s). Topics will address strengthening chapter engagement and stability, including review of template tools to guide chapters in developing annual operating budgets and political action training.
- Develop templates (with parameters), guidelines, and virtual training for chapter treasurers to help them create annual budgets for submission to the Council Office by May 2024 in alignment with RPEC's budget planning cycle.

Executive Board

- Make prudent and responsible budget decisions to reduce the deficit.
- Align the operating budget expenditures and investments with the strategic plan goals.
- Evaluate existing expenditures to potentially redirect resources to support strategic plan priorities.
- Evaluate the standing committee, workgroup, and chapter structures to ascertain if RPEC's governance structure is adequate to support implementation of the strategic plan at all levels of the organization.
- Develop Executive Board-driven roles and responsibilities for standing committees with expectations, goals, committee reporting processes, and assessments.
- Evaluate the sustainability of the chapter model for RPEC, explore alternative structures to increase member participation and engagement, and if necessary, evaluate needed modifications to the RPEC Constitution to support alternative structures.
- Task Executive Board members with the responsibility to lead chapter revitalization, in concert with the Membership Committee. Identify and rebuild under-developed or inactive RPEC chapters to strengthen statewide member engagement. Make this a standing requirement of this committee moving forward.
- Expect annual participation by all elected chapter officers and RPEC Executive Board members in the Leadership Training hosted by the Council Office. Incorporate this into duties and expectations for officers.
- Expect every chapter leadership team to participate in regional, targeted training sessions hosted by the Council Office and District Representative(s). Incorporate into responsibilities and expectations for officers.
- Expect every chapter to use its financial resources responsibly for priorities such as sending robust delegations to Convention, sending a respectable representation to Legislative Day, and promoting and holding successful membership meetings.

Council Office

- Identify and incorporate data evaluation methods to support strategic plan goal attainment, guide strategic investments, and determine tactics with available staff and resources.
- Continue to enhance the working environment at RPEC to support employee retention and recruitment. Prioritize employee stability and satisfaction to support strategic goal attainment.
- Support the Executive Board in their efforts to review and analyze the existing governance structure.
- Strengthen RPEC's governance structure through regional training and the annual Leadership Training so that Executive Board members and chapter leaders are equipped to make sound fiscal decisions and lead the organization in support of strategic plan priorities.
- Support the Executive Board and Membership Committee in their plans to restore inactive and reinvigorate failing and struggling chapters.
- Categorize and archive source documents, policies and records for regulatory compliance and organizational stability.

- Develop and reinforce policies, practices and procedures that support organizational sustainability.
- Identify and prime former active union leaders, those who held management roles and others for Council-level and chapter leadership roles.

Chapters

- Develop and adopt an annual operating budget to align with RPEC's organizational priorities and support chapter solvency. Provide the chapter operating budget to the Council Office Finance & Operations Specialist on an annual basis. Expect this task to be completed annually by chapter officers.
- Participate in the annual virtual Leadership Training and the regional trainings coordinated by the Council and Executive Board. Make this an expectation of all officers.
- Plan and budget for Convention and encourage new and existing members to attend with emphasis on potential future leaders. Strive for a robust cross-section of representation of chapter membership, as well as a healthy attendance based on the chapter's allotment of delegates. Integrate this as a leading responsibility and expectation of chapter officers going forward.

2025

Executive Board

- Whenever possible, make data-driven decisions about expenditures, investments, and strategic plan priorities.
- Continue to make prudent data-driven budget decisions to reduce the deficit.
- Continue to align the operating budget expenditures and investments with the strategic plan goals.
- Begin to develop implementation plans and timelines to support recommendations pertaining to the evaluation of the governance structure (standing committees, workgroups, and chapters).
- Evaluate the per capita allocation, in conjunction with submitted chapter operating budgets, to ensure chapters have sufficient resources to meet their operating needs.
- Task District Representatives and the Membership Committee with devising a plan for proactively integrating former union and management employees into chapter and Council leadership opportunities. Make this a standing responsibility of the Membership Committee.

Council Office

- Continue to gather and use relevant data to inform decisions and investments.
- Continue to prioritize employee stability and satisfaction to support strategic goal attainment.
- Develop a step-by-step guide, in concert with the Executive Board, to help chapter presidents prioritize succession planning for chapter and regional stability.
- Support the Executive Board in the development of plans pertaining to the restructuring of standing committees, workgroups, and chapters.
- Support the Executive Board and Membership Committee in developing plans to integrate former union members and management into leadership positions.

- Continue to support the Executive Board and Membership Committee in revitalizing struggling, failing, and inactive chapters.
- Archive and categorize source documents, policies and records for regulatory compliance and organizational stability.
- Develop and reinforce policies, practices and procedures that support organizational sustainability.
- Continually evaluate staffing needs to ensure strategic plan goal attainment. Staffing recommendations will be reviewed and approved by the Finance Committee and Executive Board.

Chapters

- Create and implement a chapter leadership succession plan. Provide annually to the Membership Committee. Make this an expectation of every chapter as a proactive effort to ensure chapter stability.

2026

Executive Board

- Implement plans pertaining to modifications to the chapter structure.
- Implement plans pertaining to the modifications to standing committee and workgroup structures.
- Implement the plan to engage former union members and management in RPEC's leadership structures.
- Based on recommendations, take next steps, such as developing an implementation plan pertaining to chapter per capita allocations.

Council Office

- Support the implementation of plans pertaining to chapter per capita.
- Support the implementation of plans pertaining to the governance structure.
- Support the implementation of the plans pertaining to former union members and management to strengthen organizational stability.
- Complete the archiving of historical and financial documents.

Chapters

- Work in concert with the Executive Board to implement plans pertaining to the chapter structure and per capita allocation.
- Support the implementation of the plans relating to integrating former union members and management into chapter activities and leadership.

2027

Executive Board, Council Office & Chapters

- Implement recommendations pertaining to RPEC's governance structure.
- Implement plans pertaining to chapter per capita allocations.
- Develop a documented assessment of the efforts, accomplishments, difficulties, and problems with the Organizational Stability goal for referral to the next strategic plan. Include evaluation of strategy and tactics for the Executive Board, Membership Committee, chapter leadership, and the Council Office professional team.

Council Office

- Assist Executive Board with developing a documented assessment of the efforts, accomplishments, difficulties, and problems with the Organizational Stability goal for referral to the next strategic plan.

Executive Board Evaluation

- Obtain 95% attendance of all chapter leaders at the annual Leadership Training hosted by the Council Office. (Allowances made for non-negotiable absences like medical issues, previously scheduled trips, etc.)
- Every chapter participates in the regional training coordinated by the Executive Board and Council Office. Attendance by at least three Executive Board members from every chapter.
- Executive Board and Membership Committee developing and leading chapter restoration efforts.
- Every chapter developing and implementing leadership succession plans.
- Executive Board's use of data to inform policy and budgetary decisions.
- Reduction of the deficit through data-driven decision-making supporting the strategic plan goals.
- Standardized reporting by Executive Board members and the Membership Committee chairperson focused on outcomes relating to recruitment, retention, engagement, and chapter restoration.
- Submission of annual operating budgets by every chapter to the Council Office by May 2024 and subsequent years to ensure ongoing alignment with strategic plan goals.
- Membership Committee implementing its plan to integrate union retirees into RPEC. Outcomes to be discussed at the quarterly Executive Board meetings.
- Continued sharing of the chapter succession plans by the Membership Committee chairperson at Executive Board meetings. Where chapters have not completed this task, the Executive Board member will follow up and assist in developing the chapter plan.
- Critical conversations and objective, in-depth analysis of RPEC's governance and funding structure to retool the organization for optimal effectiveness and strategic goal attainment.

Goal: Membership Recruitment

From 2024 through 2027, increase annual membership by 10% through increased Executive Board, Membership Committee, and chapter involvement.

Strategy

Invest in outreach tactics at a Council Office, district, and chapter level to bolster recruitment among eligible union, state, county, city, and municipal retirees.

Tactics

2023

Executive Board

- Support strategic investments in membership in the proposed 2024 operating budget.
- Ensure every regional labor council meeting statewide is attended by at least one RPEC leader.

Council Office

- Establish annual membership recruitment growth targets based on historical data and emerging trends.
- Continue to enroll current employees (state, county, city, municipal and union) poised for retirement as associate members.
- Begin to revamp the associate member program with a benefits structure that enhances upon full membership.
- Grow RPEC's relationships with locals affiliated with WFSE, AFSCME Council 2, the Teamsters, and the Washington Public Employees Association (WPEA) to increase RPEC's visibility among current and retiring union members.
- Continue to collaborate with union leaders to ensure consistent information sharing about union members approaching retirement.

Chapters

- Initiate and coordinate visibility opportunities with regional labor councils.
- Support Council Office-initiated visibility opportunities by identifying and securing volunteers.

2024

Executive Board

- Reimagine the job descriptions for chapter officers and the RPEC Executive Board to include member outreach, engagement, and communications. (Coordinate task in concert with review of governance structure).
- Develop Board-driven roles and responsibilities for Membership Committee with expectations, goals, committee reporting processes and assessments relating to membership recruitment.

- Assign the Membership Committee with devising and implementing a focused action plan to engage recently retired formerly active union members in recruiting new RPEC members.
- Task the Membership Committee with developing targeted mailing campaigns using existing lists of potential members.
- Ensure the plan and outcomes are routinely incorporated into the Membership Committee chairperson's report at Executive Board meetings.

Council Office

- Devise and implement an integrated marketing plan focusing on the recruitment of Plans 2/3 retirees. Grow Plans 2/3 memberships through a variety of tactics, including blind mailings, outreach, emerging and new technology, and through consistent investments in the RPEC website.
- Support the Membership Committee, as needed, with the implementation of their plans to integrate former union members into RPEC.
- Use database marketing to target communication to newly retired former union members.
- Support the Membership Committee in developing targeted mailing campaigns using existing lists of potential members.
- Explore new target outreach tactics to ensure associate members matriculate to full membership through an opt-out only feature.
- Continue to invest in RPEC's website infrastructure, graphics, content and features so that it provides timely and relevant information to reinforce the value of membership.
- Establish RPEC's website as the "go to" marketing tool for potential members.
- Lay the foundation for RPEC to serve as the retiree affiliate of the Teamsters (the two locals with actives who are largely public sector employees) and the Washington Public Employees Association (WPEA).
- Explore the viability of extending RPEC beyond Washington state.
- Work to secure regular visibility opportunities at Council 2 Executive Board meetings. This may include providing regular written updates, garnering visibility at the new regional town hall meetings, potentially securing a non-voting member on the Executive Board or a commitment to allow RPEC to provide standing presentations at Executive Board meetings.
- Reimagine gifted membership and associate membership programs. Pilot new models with locals affiliated with WFSE and Council 2.
- Working with AFSCME Retirees, explore receiving retirement lists for membership recruitment purposes from Council 2.
- Utilize the most popular social media outlets used by retirees, such as Facebook and YouTube, as RPEC's free advertising tools to increase visibility.

Chapters

- Support implementation of the Membership Committee to former union members. Report outcomes to the Membership Committee.
- Expect chapters to send a representative to monthly central labor council meetings. (May have a designated group rotate this responsibility.)
- Reach out to local county and city human resources departments. Request to present to employees through a "lunch and learn" presentation. If the human resources

department offers an employee fair, secure an exhibitors table and staff it with enthusiastic RPEC members.

- Give monthly updates and share information at regional labor council events to cross promote the new associate member program.
- Initiate visibility opportunities for RPEC. Staff information tables with enthusiastic volunteers.
- Support Council Office recruitment efforts with volunteers.

2025

Executive Board

- Complete revised job descriptions for RPEC Executive Board, committee chairs, workgroup chairs, and chapter leaders in concert with any recommendations regarding RPEC's governance structure.
- Share the finalized work products at an Executive Board meeting. Determine next steps.

Council Office

- Refine and promote the new associate membership program.
- Refine and promote the new gifted membership model.
- Support the Membership Committee, if and as needed, with the implementation of the plan to encourage new retirees to recruit former workers to RPEC.
- Continue to cultivate relationships with the Joint Council of Teamsters 28, WPEA and other unions, in the hopes of becoming their retiree affiliates.

Chapters

- Promote the new associate member program through outreach to locals and participation at regional labor council meetings.
- Work with the Council Office to court associate members into full membership status upon retirement.

2026

Executive Board

- Where necessary, based on re-imagined job descriptions, recommend amendments to the RPEC Constitution for consideration by the Convention body at the biennial Convention.

Council Office

- Support the Executive Board, as needed, with the preparation of materials for the 2026 Convention, relative to changes to the governance structure, job descriptions, and chapter per capita.

Chapters

- Continue to initiate and expand visibility opportunities for RPEC with regional labor councils.
- Engage new members in recruiting others, from their former workplaces, to become RPEC members.

Executive Board

- Attend Executive Board training and work with agreements under revised job descriptions, including reporting and assessment at quarterly meetings.
- Develop a documented assessment of the efforts, accomplishments, difficulties, and problems with the Membership Recruitment goal for referral to the next strategic plan. Include evaluation of strategy and tactics for the Executive Board, Membership Committee, chapter leadership and the Council Office professional team.

Council Office

- Educate and support members and leaders about the decisions rendered by the Convention body regarding the adoption of new job descriptions for Executive Board members, chapter presidents, standing committee chairs, and work group chairs.
- Assist Executive Board with developing a documented assessment of the efforts, accomplishments, difficulties, and problems with the Membership Recruitment goal for referral to the next strategic plan.

Chapters

- Align succession planning activities with revised job descriptions.
- Support the education effort of members about leadership roles and responsibilities.

Executive Board Evaluation

- Amendments to the job descriptions for leaders will include an added focus on member recruitment, retention, engagement, and communication, and will be presented to the RPEC Constitution by the Convention body in 2026.
- Grow RPEC's shares/likes and audience through increased social media engagement, advertising, and promotional campaigns.
- Grow unique visitors, returning visitors and visitors' 'time-on-site' to the RPEC website through dynamic content delivery to members, and through union and new member outreach.
- Where possible, track the effectiveness of targeted outreach and mailings to former union members, potential members, and leaders.
- Outcome-based reporting by the Membership Committee chairperson regarding recruitment plans targeting former union members.
- Confirm RPEC as the retiree affiliate for the two Teamster locals with high percentages of public sector employees.
- Confirm RPEC as the retiree affiliate for WPEA.
- Continue to deepen the relationships and expand visibility opportunities with WFSE, Council 2, Teamsters (two locals with high percentages of public sector employees) and WPEA.

Goal: Membership Retention & Engagement

From 2024 to 2027, chapter leaders will actively build relationships with new members and will report outcomes every six months to the Membership Committee, their RPEC District Representative(s), and the Council Office.

Strategy

Require chapter leaders to prioritize new and existing member retention and engagement. Chapter leaders will contact new members within 3 months of joining RPEC. Ensure chapter leaders actively work to engage and integrate members into chapter activities, advocacy, and leadership.

Tactics

2024

Executive Board

- Evaluate the chapter leadership structure while also evaluating the roles, functions and structure of standing committees and workgroups to support implementation of strategic plan priorities, including membership retention and engagement.
- Provide recommendations to strengthen the governance structure at all levels of the organization to support membership-related goals.
- Expect all chapters to include Membership Committee and Legislative Committee chairpersons to foster greater engagement in chapter activities and legislative advocacy.
- Examine and potentially redefine the responsibilities of the Membership Committee to incorporate communications between Committee members and RPEC Executive Board District Representative(s).
- Assign the Membership Committee and Executive Board members to work with chapter presidents to implement the step-by-step guide, developed in 2023 by the Council Office, to identify new members and foster engagement.
- Expect every chapter to report annually on new member engagement efforts and successes to the Membership Committee.
- Expect membership retention information and engagement to be incorporated into standing reports by the Membership Committee at Executive Board meetings.
- Assess Membership Committee's alignment with Board-driven roles and responsibilities with respect to membership retention and engagement.
- Expect chapter leaders to use sign-in sheets at meetings to gather current contact information.

Council Office

- Support the Executive Board, as needed, in coordinating meetings to support the evaluation of the governance structure of chapters, standing committees and workgroups.
- Support the Executive Board, as needed, in coordinating meetings relating to the Board's plans to strengthen local chapters to support member retention and engagement.

- Work with the Membership Committee to help them gather and collect chapter recruitment, retention, and engagement information to support data-driven decision making and strategy development.
- Designate time in the Executive Board agenda, as a standing agenda item, for detailed updates from the Membership Committee chairperson on member retention, and engagement efforts and accomplishments.
- Make the new member engagement plan a key area of focus for the regional virtual trainings to be coordinated by the Executive Board and the Council Office.
- Develop a sign-in sheet template for chapter presidents to use at all events and meetings.

Chapters

- Ensure all members are aware of upcoming RPEC events and urge them to participate.
- Attend the regional virtual trainings hosted by the Executive Board and Council Office.
- Using the sample plan provided by the Council Office, devise and implement a chapter-level retention and engagement plan for all members, but especially those who are new or inactive.
- Explore, develop, and share new ways to engage new and inactive members.
- Appoint a chapter membership chair to lead chapter membership recruitment, retention, and engagement efforts. (This position was common in chapters prior to 2020).
- Use the template sign-in sheet at all meetings. Stress the importance of being able to receive RPEC's communications (such as time sensitive calls to action).
- Assign the chapter secretary or a designee of the chapter president to update the contact information and to share it with the Council Office to ensure the membership data is up to date. Standardize the sharing of the updated contact information as a standing function of the chapter secretary or the president's designee.

2025

Executive Board

- Devise and implement plans, based on recommendations, relative to changes to RPEC's governance structure at statewide and/or chapter levels.
- Expect the Membership Committee and chapter leaders to prioritize new and inactive member engagement.
- Ensure the Membership Committee chairperson's reports include outcomes relative to new member retention and engagement.
- Assess Membership Committee's alignment with Board-driven roles and responsibilities with respect to membership retention and engagement.

Council Office

- Support the Executive Board in the implementation of any modifications to the governance structure.
- In concert with Executive Board members, continue to hone the virtual regional training model to support member engagement at a chapter level.
- Ensure the Membership Committee report, focused on data and outcomes, is incorporated as a standing agenda item for Board meetings.

- Support the Membership Committee in launching data collection with chapters to enable evaluation of membership-related strategic plan goals.

Chapters

- Continue to hone and implement chapter membership-related plans that support attainment of the strategic plan goals.
- Report efforts and successes to the Membership Committee every six months as prescribed by the Board.
- Actively engage more members by hosting virtual meetings or hybrid meetings.
- Continually promote the many ways members can engage with RPEC.

2026

Executive Board

- Continue to expect chapter leaders to participate in the regional virtual trainings to support strategic plan membership goals.
- Assess Membership Committee's alignment with Board-driven roles and responsibilities with respect to membership retention and engagement.

Council Office

- Continue to support the Board's retention and engagement plans to reach strategic plan goals.

Chapters

- Continue to hone and implement chapter membership-related plans that support attainment of the strategic plan goals.
- Ask the Membership Committee chair to give standing reports.
- Continue to refine reporting of retention and recruitment efforts and successes to the Membership Committee biannually.
- Encourage all in-person meetings to migrate to hybrid formats, where possible.
- Continually promote the many ways members can engage with RPEC.

2027

Executive Board

- Develop a documented assessment of the efforts, accomplishments, difficulties, and problems with the Membership Retention & Engagement goal for referral to the next strategic plan. Include evaluation of strategy and tactics for the Executive Board, Membership Committee, chapter leadership and the Council Office professional team.

Council Office

- Assist Executive Board with developing a documented assessment of the efforts, accomplishments, difficulties, and problems with the Membership Retention & Engagement goal for referral to the next strategic plan.

Executive Board Evaluation

- Restructure the Membership Committee for greater effectiveness in member recruitment, retention, and engagement.
- Each Executive Board member, in concert with members of the Membership Committee, will review the new member engagement plans crafted by chapters, and will commit to supporting chapter leaders with these efforts.
- Executive Board members' District Reports will focus on chapter outcomes specific to recruitment, retention, and engagement.
- Outcome focused reporting by the Membership Committee chair at Executive Board meetings.
- Chapters reporting retention and recruitment data, efforts, and outcomes every six months to the Membership Committee. (This timeframe and accountability were specified by the Executive Board in the August 2023 work session.)
- Chapters outreach to new and inactive members within three months. (This timeframe and accountability were specified by the Executive Board in the August 2023 work session.)
- Data collection mechanisms will be used consistently by chapter leaders and Executive Board members to support decision-making and mid-course corrections in the strategic plan.

Goal: Member Communications

By fall 2027, expand RPEC's member communications matrix to include new tools to educate and engage more Plans 2/3 members. Support member retention and advocacy through continued investments in strategic communications tools and resources. Increase visibility among potential members.

Strategy

Enhance and expand communications efforts to demonstrate RPEC's dominance in state and federal legislative advocacy for public sector retirees.

Tactics

2023

Executive Board

- Support strategic investments in communications to support membership recruitment, retention, and engagement.

Council Office

- Continue the high-quality communications tools valued by members to include targeted e-blasts, the weekly NewsFlash, website, and printed membership newsletter.
- Continue working toward the launch of an updated and redesigned website for spring 2024.
- Develop and implement advertising campaigns on Facebook to increase visibility and page following/likes.

Chapters

- Encourage members to visit the website for the latest information about RPEC.
- Encourage members to follow RPEC on Facebook.

2024

Executive Board

- Provide timely and relevant input on the pilot website.
- All Executive Board members, who are active on Facebook and YouTube, will follow RPEC and will commit to reposting and commenting on RPEC posts to stimulate engagement.
- Encourage chapter presidents to follow RPEC on Facebook, read the weekly NewsFlash e-blasts, and visit the new website.

Council Office

- Develop a strategic communications plan that includes a supplemental social media editorial calendar and action plan.
- Work in concert with AFSCME Retirees digital marketing and communications team to explore and develop new communications methods and tools for potential members, new members, and existing members.

- Work in concert with AFSCME Retirees digital marketing and communications team to explore and develop new communications methods and tools to build member and organizational advocacy on state and federal levels.
- Explore costs and options to expand the printed Council Quarterly Newsletter to provide more in-depth coverage of legislative advocacy and to build member engagement.
- Launch a revamped website. Continue to invest in the website to ensure it is visually appealing, user friendly and easy to navigate, and content rich as the organization's leading communications tool.
- Leverage technology tools to package and disseminate timely and relevant information to members.
- Explore, invest in, and implement new tools to engage new members and those vested in Plans 2/3.
- Create a sign-in sheet template for chapter presidents to use consistently at all monthly meetings and events. Use this information to keep chapter and Council databases as current as possible to support member communication.
- Develop targeted communications efforts for associate members, former union leaders, and new members who enroll from mailings.
- Develop communications workshops for leaders pertaining to Zoom, social media channels, robocalls, etc., to support broader member communication and engagement.
- Support chapters in transitioning to hybrid meetings, where possible.

Chapters

- Ensure all active chapters offer a digital and/or print newsletter.
- Encourage all chapters to migrate to hybrid formats.

2025

Executive Board

- Continue to support investments in strategic communications to support attainment of membership recruitment, retention, and engagement goals. Support professional team in building additional communication skills, including marketing, communications, and advertising.

Council Office

- Continue working in concert with AFSCME Retirees digital marketing and communications team to explore new communications methods and tools for potential members, new members, and existing members.
- Continue building additional communication skills, including marketing, communications, and advertising.
- Explore the use of templated website sub-domains with simplified administration for use by chapters.

Chapters

- Encourage chapters to develop Facebook groups as another means of engaging and educating members.

- Partner with the Council Office in promoting the RPEC website and other new communications tools to underscore the value of membership.

2026

Executive Board

- Continue to support investments in strategic communications to support attainment of membership recruitment, retention, and engagement goals.

Council Office

- Continue to implement the strategic communications plan making mid-course corrections based on member feedback and engagement.
- Continue to invest in and test new communications tools and strategies to engage associate members, new members, former union members, inactive members, and more Plans 2/3 members.
- Continue investments in the website as RPEC's lead marketing communications tool.
- Develop and implement templated website sub-domains with simplified administration for use by chapters.
- Develop training to assist chapter leaders in launching chapter websites.

Chapters

- Ensure all active chapters offer digital and/or print newsletters.
- Implement individual chapter websites, under the primary RPEC domain, for enhanced member communications.

2027

Executive Board

- Develop a documented assessment of the efforts, accomplishments, difficulties, and problems with the Member Communications goal for referral to the next strategic plan. Include evaluation of strategy and tactics for the Executive Board, chapter leadership and the Council Office professional team.

Council Office

- Assist Executive Board with developing a documented assessment of the efforts, accomplishments, difficulties, and problems with the Member Communications goal for referral to the next strategic plan.

Executive Board Evaluation

- Evaluate the strategic communications plan tactics using metrics and available data. Make midcourse corrections based on findings. Provide the Executive Board with regular reporting on insights and metrics.
- Evaluate effectiveness of social media action plan through member engagement.
- Evaluate the effectiveness of digital marketing, advertising, and advocacy campaigns with regular reporting to the Executive Board.
- Evaluate the effectiveness of promoting the website as the “go to” information tool based on monthly visitors, page views, etc. Council Office will use available analytics to inform changes to messaging and strategy.
- Number of chapters producing newsletters – print and digital.
- Number of chapters with chapter webpages under RPEC’s domain.
- Executive Board’s continued investment in strategic communications to fuel membership recruitment, retention, and engagement, and to support RPEC’s branding and visibility.

Goal: Federal Advocacy for Retirement Security

By 2027, increase RPEC's leadership in Washington state in protecting and expanding federal retirement benefits.

Strategy

Expand RPEC's federal advocacy and member engagement in federal advocacy efforts through increased member education, communications, and organizing.

Tactics

2023

Executive Board

- Continue to support federal advocacy efforts aligned with RPEC's Legislative Priorities.
- Continue to take swift action on time-sensitive matters.
- Support the Council Office's efforts to mobilize members, often under deadline constraints, in federal policy priorities.
- Continue to invest in the Executive Director's participation in federal "Day on the Hill" activities hosted by AFSCME Retirees. (AFSCME Retirees pay for two delegates from RPEC, typically the president and/or members of the Executive Committee.)

Council Office

- Continue to ensure that communications tools consistently address federal relations priorities articulated in the Legislative Priorities.
- Provide timely and relevant information on federal advocacy priorities to members.

Chapters

- Keep RPEC's federal advocacy efforts visible with all members, especially those in Plans 2/3.
- Support the federal advocacy efforts by helping the Council and Legislative Committee collect member stories for legislative advocacy.

2024

Executive Board

- Sponsor resolutions with WSLC, other labor groups, and WSARA regarding RPEC's federal relations priorities, as needed.
- Support RPEC's Speakers Series with full Executive Board attendance. Consider this an expectation of service on the Executive Board.
- Expect every chapter to send at least one representative to attend the virtual Speakers Series. Make this a standing expectation.
- Task the Legislative Committee with building a strong federal advocacy issues platform with a focus on educating chapters and members.
- Expect all Executive Board members to take part in the virtual "Day on the Hill" with the Washington Congressional delegation. Integrate this as a standing responsibility and expectation.

Council Office

- Address federal relations priorities through new communications strategies.
- Strengthen rapport at a Council and chapter level with members of Washington's Congressional delegation.
- Coordinate annual virtual "Day on the Hill" meetings to allow members to directly communicate with their Congressional leaders.
- Create opportunities for members to engage in federal advocacy by leveraging new and emerging technology.
- Assist the Legislative Committee with building a strong federal advocacy issues platform with a focus on educating chapters and members.
- Provide training and step-by-step guides for members on how to testify and speak with federal legislators.
- Ensure chapter and/or Council leaders meet with members of the Congressional delegation on an annual basis.
- Initiate another Speakers Series event with a speaker of note who will address a federal benefit priority of retirees vested in Plans 2/3.
- Work in concert with AFSCME Retirees digital marketing and communications team to explore and develop new communications methods and tools to build member and organizational federal advocacy.

Chapters

- Strengthen rapport with members of Washington's Congressional delegation.
- Encourage members to take part in the virtual "Day on the Hill" with Washington's Congressional delegation.

2025

Executive Board

- Carry member-driven federal priorities to Washington's Congressional delegation during Lobby Day, hosted by AFSCME Retirees.

Council Office

- Incorporate federal updates as standing elements in the Quarterly Newsletter and Executive Director Monthly Letter.
- Tap federal-level speakers for the Speakers Series, webinars, and podcasts.
- Coordinate and assist RPEC delegates with member-driven federal priorities for AFSCME Retirees Lobby Day.
- Report to membership the results from RPEC meetings with Congressional delegation.

Chapters

- Encourage members to attend Speakers Series meetings and webinars.
- Keep federal advocacy efforts visible with members.

2026

Executive Board

- Expect all Executive Board members to take part in the virtual "Day on the Hill" with Washington's Congressional delegation.

- Encourage chapter leaders to take part in the virtual “Day on the Hill” with Washington’s Congressional delegation.

Council Office

- Expand social media posting relative to federal topics of interest to members.
- Feature a top-tier federal speaker for the Speakers Series.
- Explore opportunities for engagement campaigns to boost member engagement in federal advocacy. Coordinate annual virtual “Day on the Hill” meetings to allow members to directly communicate with their Congressional leaders.
- Report to membership the results of the virtual “Day on the Hill” meetings.

Chapters

- Share RPEC’s federal advocacy efforts with regional labor councils.
- Encourage members to take part in the virtual “Day on the Hill” with Washington’s Congressional delegation.

2027

Executive Board

- Carry member-driven federal priorities to AFSCME Retirees Lobby Day.
- Develop a documented assessment of the efforts, accomplishments, difficulties, and problems with the Federal Advocacy goal for referral to the next strategic plan. Include evaluation of strategy and tactics for the Executive Board, Legislative Committee, chapter leadership and the Council Office professional team.

Council Office

- Coordinate and assist RPEC delegates with member-driven federal priorities for AFSCME Retirees Lobby Day.
- Assist Executive Board with developing a documented assessment of the efforts, accomplishments, difficulties, and problems with the Federal Advocacy goal for referral to the next strategic plan.

Executive Board Evaluation

- Evaluate effectiveness of RPEC meetings with Congressional delegation outside of AFSCME Retirees Lobby Day.
- Evaluate virtual “Day on the Hill” meetings with Congressional delegation.
- Evaluate relationship building between chapters and Congressional delegation.

Strategic Plan Next Steps

The Executive Board, in concert with the Council, will implement the plan once it is finalized and formally adopted. Plans like this are designed to be reviewed on a periodic basis to make mid-course modifications, based on changing circumstances, resources and available data. At minimum, the Executive Board will consider progress on all goal areas at least once per year. The Strategic Plan will be integrated into every standing Executive Board meeting. Here are some potential next steps to begin the implementation of the plan.

2023

- Assign an Ad Hoc Executive Board Committee with the responsibility for outlining potential next steps for the Executive Board, relative to 2024 priorities. This Ad Hoc Committee will be composed of three (3) Executive Board members, two (2) Executive Committee members, and the Executive Director. The Ad Hoc Committee will present recommendations at the February 2024 meeting.
- Secure support from AFSCME Education Division, AFSCME Retirees, and/or an independent facilitator to support the Executive Board with plan implementation in 2024.
- Determine next steps with specific timelines and outcomes, including the roles and responsibilities of the Executive Board.
- Insert a standing line-item on the Executive Board agenda to discuss strategic plan priorities.

2024

- Discuss and determine next steps relating to review and analysis of the organization's governance structure and the development of job descriptions.
- Report actions and progress to date relative to the review of the governance structure, chapter activities relative to new member and inactive member engagement, and plans structured by the Membership Committee to support recruitment, retention, and engagement.
- Determine next steps with specific timelines and outcomes (for the above-mentioned priorities).
- Assign the Ad Hoc Executive Board Committee with the responsibility of outlining potential next steps for the Executive Board relative to the analysis of the chapter per capita allocations (2025 priority). This Ad Hoc Committee will be composed of three (3) Executive Board members, two (2) Executive Committee members, and the Executive Director. The Ad Hoc Committee will outline proposed next steps at the November 2024 Executive Board meeting.
- Determine next steps with specific timelines and outcomes for 2025 relative to the review of the chapter per capita.
- Review of progress to date on all goal areas.
- Secure support from AFSCME Education Division, AFSCME Retirees, and/or an independent facilitator to support the Executive Board with plan implementation in 2025.

2025

- Consider recommendations regarding the organization's governance structure and job descriptions for officers with a focus on member communications, recruitment, retention, engagement, and advocacy.
- Take necessary action to make progress on the per capita allocation assessment.
- Report actions and progress to date relative to the review of the per capita chapter allocations.
- Continue to review progress to date on all goal areas.
- Secure support from AFSCME Education Division, AFSCME Retirees, and/or an independent facilitator to support the Executive Board with plan implementation for 2026.

2026

- Act on recommendations about the governance structure.
- Review and act on recommendations on chapter per capita.
- Where appropriate, sponsor resolutions for the 2026 Convention for recommendations to be considered by the Convention body.
- Continue to review progress to date on all goal areas.
- Secure support from AFSCME Education Division, AFSCME Retirees, and/or an independent facilitator to support the Executive Board with the evaluation of the plan and the steps needed to begin strategic planning in 2027/2028.

2027

- Schedule time to review successes, learnings, data, and aspects of the strategic plan that were not attained.
- Determine next steps, processes, and timeline relative to a revised strategic plan or the development of a new strategic plan to guide RPEC from fall 2027 through at least fall 2030.
- Secure support from AFSCME Education Division, AFSCME Retirees, and/or an independent facilitator to support the Executive Board with the development of a new strategic plan in 2028.

Executive Board Key Milestones 2024-2027

2024

Evaluate the standing committee, workgroup, and chapter structures.

Develop Executive Board-driven roles and responsibilities for standing committees.

Evaluate the sustainability of the chapter model for RPEC, explore alternative structures and evaluate needed modifications to the Constitution.

Lead chapter revitalization, in concert with the Membership Committee.

Task the Membership Committee with developing targeted mailings to potential members.

Assign the Membership Committee with devising and implementing a focused action plan to engage recently retired union members.

Membership Committee and Executive Board members work with chapters to implement a plan to identify new members and foster engagement.

Task the Legislative Committee with building a strong federal advocacy platform.

Executive Board members take part in the virtual federal "Day on the Hill."

2025

Evaluate the per capita allocation, in conjunction with submitted chapter operating budgets.

Develop implementation plans and timelines to support recommendations pertaining to the evaluation of the governance structure.

Task District Representatives and the Membership Committee with devising a plan to integrate former union and management into leadership opportunities.

Complete revised job descriptions for Executive Board, committee chairs, workgroup chairs, and chapter leaders.

Support investments in communications to attain membership recruitment, retention, and engagement goals.

2026

Develop an implementation plan pertaining to chapter per capita allocations.

Implement plans pertaining to modifications to the chapter, standing committee, and workgroup structures.

Implement the plan to engage former union members and management in leadership structures.

Based on re-imagined job descriptions, recommend amendments to the Constitution for consideration by the Convention.

2027

Finalize implementation of all goals.

Evaluate effectiveness and learnings for referral to the next strategic plan.

Evaluation Timeline

For the plan to make progress, the Executive Board must commit time annually to discuss the plan, the progress to date, obstacles and mid-course corrections. Here is a tentative evaluation timeline to ensure continual focus and progress on the strategic plan goals:

2024

- May 2024 Review progress to date by the Executive Board and Membership Committee.
- Nov. 2024 Review entire plan, progress to date, and next steps with newly elected Board members at November Executive Board training/retreat.

2025

- Nov. 2025 Review goal areas with progress to date. Review relevant data. Make mid-course corrections as needed.

2026

- May 2026 Review all goal areas and progress to date. Make mid-course corrections as needed.
- Nov. 2026 Review entire plan, progress to date, and next steps with newly elected Board members at November Executive Board training/retreat. Discuss development timeline and research/data needs to inform a revised or new strategic plan for fall 2027 through at least fall 2030.

2027

- Feb. 2027 Review data, learnings, successes and challenges regarding Organizational Sustainability, Member Communications, and Federal Advocacy for Retirement Security goals. Ascertain data and research needs for the foundation of a revised or new strategic plan.
- May 2027 Review data, learnings, successes and challenges regarding the Membership Recruitment and Membership Retention and Engagement goals. Ascertain data and research needs for the foundation of a revised or new strategic plan.
- Aug. 2027 Host Executive Board work session to review all findings and identify goals for 2028 through at least 2030.
- Nov. 2027 Develop a new strategic plan, if needed, or revise the 2023-27 plan to reflect new priorities for 2028-2030.

Appendix

- A. Membership Trend Data
- B. Findings: Scientific Membership Poll, Feb. 2023
- C. Findings: Strategic Planning Listening Session, April 2023
- D. Findings: Membership Written Survey, May 2023

Total Membership Statistics

- The up and down trend has remained consistent, with most new members joining RPEC through the annual AFSCME Blind Mailing.
 - o Member-to-member recruitment accounted for less than 3% of our total new members in 2022.
- Members typically drop due to a life transition (i.e. passing, moving into assisted living, moving out of state).
 - o A small number also drop due to disagreement with the political candidates we endorse through the RPEC PAC.
- We use a 4-step system for communicating with members who are late on their dues before they are dropped.
 - o The Finance & Operations Specialist sends out a total of 3 reminders via mail when a member's dues are delinquent.
 - o If there are no responses, the Membership Coordinator calls the member.
- The only metric we can truly influence includes those who "Drop by Request."

New Members: 1/1/22 - 12/31/22		
Type	Count	Percentage
Retiree	909	99.24%
Associate	7	0.76%
Total	916	100%

Member Drops: 1/1/22 - 12/31/22		
Status	Count	Percentage
DEC	538	71%
DBR	130	17%
DND	43	6%
WID	50	7%
TOTAL	761	100%

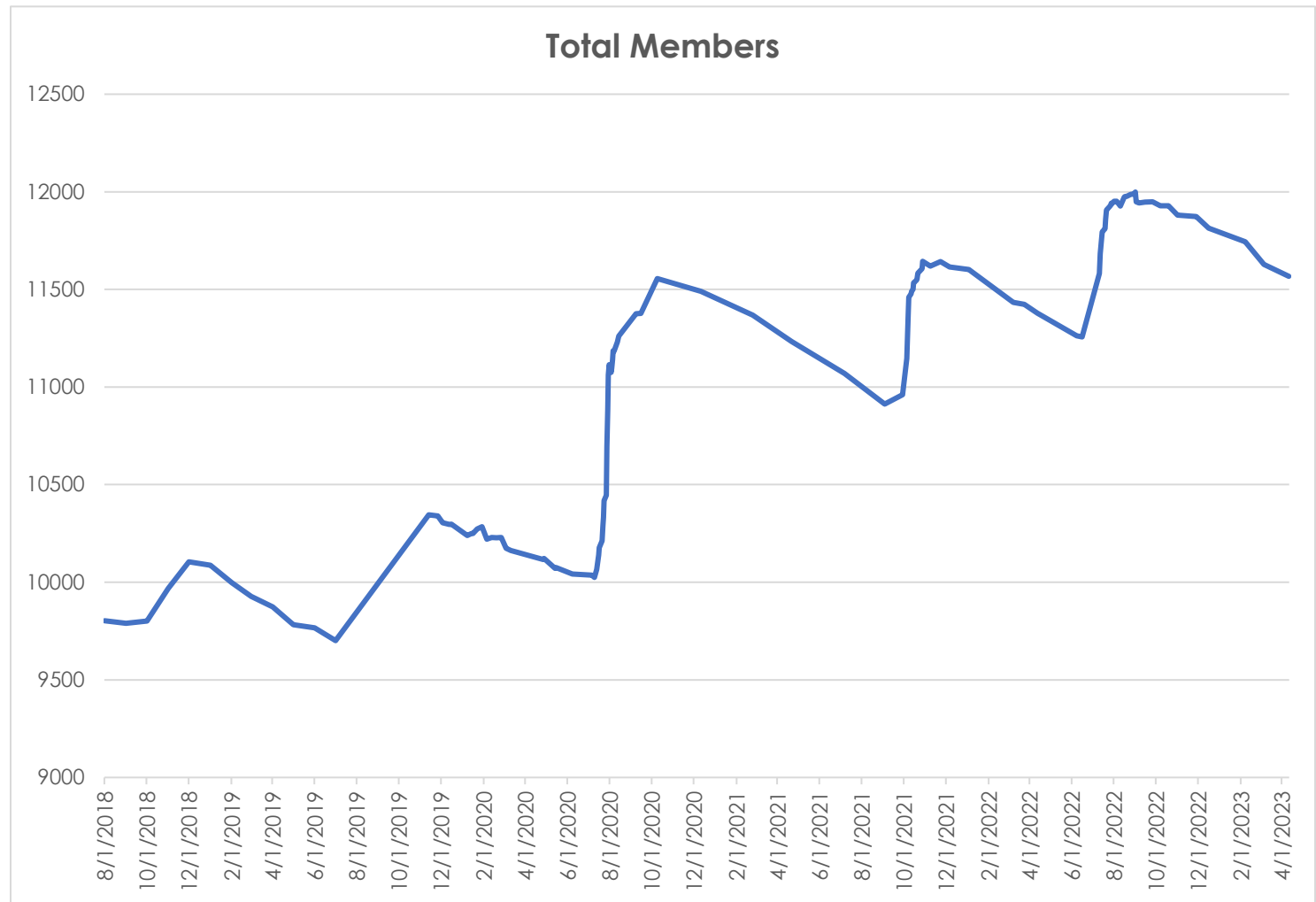
2022 Member Surplus: 155 members

DEC: Deceased

DBR: Drop by Request

DND: Drop No Dues

WID: Widowed



WA RPEC Poll Results

Feb 22-24, 2023

HELLO

Hello, my name is _____, and I'm calling on behalf of the Retired Public Employees Council (RPEC) of Washington State with a brief survey to our members. The purpose of this poll is to gain insight from members to help our elected Executive Board develop a strategic plan.

Choices		PERS1		THE REST		COMBINED	
<FNAME> Speaking	1	237	49.89%	238	50.11%	475	100.00%
Total		237	100.00%	238	100.00%	475	100.00%

Q1

In general, would you say things in the country are headed in the right direction, or would you say things are off on the wrong track?

Choices		PERS1		THE REST		COMBINED	
Right direction	1	76	32.07%	63	26.47%	139	29.26%
Wrong track	2	107	45.15%	116	48.74%	223	46.95%
[DNO] Neither/Mixed	3	37	15.61%	43	18.07%	80	16.84%
[DNO] Don't Know/Refused	9	17	7.17%	16	6.72%	33	6.95%
Total		237	100.00%	238	100.00%	475	100.00%

Q2

How would you describe your own personal economic situation today as compared to two years ago - would you say it is getting better, getting worse or about the same?

Choices		PERS1		THE REST		COMBINED	
Getting better	1	36	15.19%	41	17.23%	77	16.21%
Getting worse	2	62	26.16%	57	23.95%	119	25.05%
About the same	3	135	56.96%	138	57.98%	273	57.47%
[DNO] Don't know/Refused	9	4	1.69%	2	0.84%	6	1.26%
Total		237	100.00%	238	100.00%	475	100.00%

Q3

When thinking about your retirement, how secure do you feel about your pension?

Do you feel... (READ CHOICES)

Choices		PERS1		THE REST		COMBINED	
Very secure	1	88	37.13%	84	35.29%	172	36.21%
Somewhat secure	2	103	43.46%	107	44.96%	210	44.21%
Somewhat insecure	3	29	12.24%	34	14.29%	63	13.26%
Very insecure	4	10	4.22%	8	3.36%	18	3.79%
[DNO] don't have a pension	5	1	0.42%	0	0.00%	1	0.21%
[DNO] Don't Know / Refused	9	6	2.53%	5	2.10%	11	2.32%
Total		237	100.00%	238	100.00%	475	100.00%

Q4

When thinking about voting in elections, what is the most important issue to you personally? (choose only one)

Choices			PERS1		THE REST		COMBINED
Jobs and the economy	01	30	12.66%	23	9.66%	53	11.16%
Inflation	02	7	2.95%	7	2.94%	14	2.95%
Health Care	03	15	6.33%	19	7.98%	34	7.16%
Immigration	04	5	2.11%	4	1.68%	9	1.89%
Education	05	2	0.84%	6	2.52%	8	1.68%
Crime and drugs	06	12	5.06%	12	5.04%	24	5.05%
Coronavirus pandemic	07	0	0.00%	0	0.00%	0	0.00%
National debt/Federal budget	08	6	2.53%	11	4.62%	17	3.58%
Women's rights / Pro-Choice / Reproductive rights	09	11	4.64%	15	6.30%	26	5.47%
Pro-Life / Opposed to Abortion	10	1	0.42%	6	2.52%	7	1.47%
Income inequality	11	2	0.84%	7	2.94%	9	1.89%
Environment/Climate change	12	17	7.17%	11	4.62%	28	5.89%
Social Security & Medicare	13	36	15.19%	29	12.18%	65	13.68%
Police reform	14	2	0.84%	1	0.42%	3	0.63%
Gun Control	15	3	1.27%	6	2.52%	9	1.89%
National Security	16	8	3.38%	7	2.94%	15	3.16%
Taxes	17	0	0.00%	1	0.42%	1	0.21%
Protecting voting rights / Challenges to democracy	18	31	13.08%	25	10.50%	56	11.79%
Other (please specify)* (see below)	19	33	13.92%	44	18.49%	77	16.21%
[DNO] Refused / Dont know	99	16	6.75%	4	1.68%	20	4.21%
Total		237	100.00%	238	100.00%	475	100.00%

Q5

*must choose only 1 - "the greatest threat"

What do you think is the greatest threat to retirement security? Is it...

Choices			PERS1		THE REST		COMBINED
Attacks on workers and their unions' ability to organiz	1	7	2.95%	6	2.52%	13	2.74%
Federal politicians' attempts to cut or privatize progra	2	130	54.85%	144	60.50%	274	57.68%
State and local politicians' attempts to cut pension be	3	26	10.97%	21	8.82%	47	9.89%
Drug companies price gouging seniors with high presc	4	16	6.75%	15	6.30%	31	6.53%
The rise of 401ks replacing pensions	5	9	3.80%	6	2.52%	15	3.16%
Inflation cutting into seniors purchasing power	6	36	15.19%	33	13.87%	69	14.53%
[DNO] Don't know/Refused	9	13	5.49%	13	5.46%	26	5.47%
Total		237	100.00%	238	100.00%	475	100.00%

Q6

*must choose only 1 - "the best way"

Which do you think is the best way to protect and expand retiree benefits for people

Choices			PERS1		THE REST		COMBINED
Organizing public service retirees to stand up to anti-i	1	43	18.14%	39	16.39%	82	17.26%
Grassroots lobbying of politicians to make sure they p	2	65	27.43%	65	27.31%	130	27.37%
Taking part in political action to elect pro-worker & re	3	63	26.58%	56	23.53%	119	25.05%
Working with coalitions of allied organizations to pres	4	19	8.02%	39	16.39%	58	12.21%
Raising public awareness of retiree issues through der	5	10	4.22%	12	5.04%	22	4.63%
Other (SPECIFY):	6	14	5.91%	12	5.04%	26	5.47%
[DNO] Don't know/ Refused	9	23	9.70%	15	6.30%	38	8.00%
Total		237	100.00%	238	100.00%	475	100.00%

Q7

How would you rate RPEC of Washington 's overall performance in representing you and other retiree members. Would you say RPEC is doing an excellent job, good job, not so good, or poor job?

Choices		PERS1		THE REST		COMBINED	
Excellent	1	71	29.96%	52	21.85%	123	25.89%
Good	2	128	54.01%	132	55.46%	260	54.74%
Not so good	3	13	5.49%	21	8.82%	34	7.16%
Poor	4	6	2.53%	6	2.52%	12	2.53%
[DNO] Don't know/Refused	9	19	8.02%	27	11.34%	46	9.68%
Total		237	100.00%	238	100.00%	475	100.00%

Q8

How would you rate your national retiree union, AFSCME Retirees ' overall performance in representing you and other retiree members... Would you say your union is doing an excellent job, good, not so good, or poor job?

Choices		PERS1		THE REST		COMBINED	
Excellent	1	24	10.13%	27	11.34%	51	10.74%
Good	2	118	49.79%	112	47.06%	230	48.42%
Not so good	3	28	11.81%	28	11.76%	56	11.79%
Poor	4	4	1.69%	6	2.52%	10	2.11%
[DNO] Don't know/Refused	9	63	26.58%	65	27.31%	128	26.95%
Total		237	100.00%	238	100.00%	475	100.00%

Q9

(must only choose one - Biggest reason joined)

What is the biggest reason you are a member of RPEC?.... Is it because ...(READ LIST)

Choices		PERS1		THE REST		COMBINED	
RPEC protects my retirement benefits like pensions, S	1	173	73.00%	160	67.23%	333	70.11%
RPEC offers member-only benefits like family scholars	2	1	0.42%	3	1.26%	4	0.84%
A friend or former coworker asked me to join	3	9	3.80%	8	3.36%	17	3.58%
To continue my union participation	4	34	14.35%	45	18.91%	79	16.63%
Other (SPECIFY)	5	9	3.80%	13	5.46%	22	4.63%
[DNO] Don't Know / Refused	9	11	4.64%	9	3.78%	20	4.21%
Total		237	100.00%	238	100.00%	475	100.00%

Q10

When thinking about how often you hear from RPEC, how would you describe it? Is it (READ CHOICES)

Choices		PERS1		THE REST		COMBINED	
Too often	1	3	1.27%	11	4.62%	14	2.95%
About right	2	212	89.45%	195	81.93%	407	85.68%
Not enough	3	15	6.33%	17	7.14%	32	6.74%
[DNO] I never hear from them	4	3	1.27%	5	2.10%	8	1.68%
[DNO] Don't Know/Refused	9	4	1.69%	10	4.20%	14	2.95%
Total		237	100.00%	238	100.00%	475	100.00%

Q11

(must only choose one - best preference)

How do you prefer to receive information from RPEC?.... (READ CHOICES)

Choices		PERS1		THE REST		COMBINED	
visit RPEC website	1	4	1.69%	5	2.10%	9	1.89%
U.S. mail	2	104	43.88%	101	42.44%	205	43.16%
Emails	3	100	42.19%	100	42.02%	200	42.11%
Social Media	4	1	0.42%	5	2.10%	6	1.26%
Phone calls	5	10	4.22%	9	3.78%	19	4.00%
Text messages	6	7	2.95%	11	4.62%	18	3.79%
Prerecorded calls	7	5	2.11%	4	1.68%	9	1.89%
[DNO] No Contact / None	8	3	1.27%	3	1.26%	6	1.26%
[DNO] Refused	9	3	1.27%	0	0.00%	3	0.63%
Total		237	100.00%	238	100.00%	475	100.00%

Social Media Battery**Q12_1 - 9****Which of the social media platforms do you use?...(Select all that apply)**

Choices		PERS1		THE REST		COMBINED	
Facebook							
Yes	1	101	42.62%	118	49.58%	219	46.11%
No	2	136	57.38%	120	50.42%	256	53.89%
Total		237	100.00%	238	100.00%	475	100.00%
Twitter							
Yes	1	6	2.53%	11	4.62%	17	3.58%
No	2	231	97.47%	227	95.38%	458	96.42%
Total		237	100.00%	238	100.00%	475	100.00%
Instagram							
Yes	1	9	3.80%	11	4.62%	20	4.21%
No	2	228	96.20%	227	95.38%	455	95.79%
Total		237	100.00%	238	100.00%	475	100.00%
You Tube							
Yes	1	35	14.77%	45	18.91%	80	16.84%
No	2	202	85.23%	193	81.09%	395	83.16%
Total		237	100.00%	238	100.00%	475	100.00%
None							
Yes	1	115	94.26%	90	90.00%	205	92.34%
No	2	7	5.74%	10	10.00%	17	7.66%
Total		122	100.00%	100	100.00%	222	100.00%
Refused to answer							
Yes	1	1	0.82%	8	8.00%	9	4.05%
No	2	121	99.18%	92	92.00%	213	95.95%
Total		122	100.00%	100	100.00%	222	100.00%

Q13**How frequently do you use social media like Facebook or YouTube to get news and information about current events?**

Choices		PERS1		THE REST		COMBINED	
All the time	1	56	46.28%	56	39.72%	112	42.75%
Sometimes	2	23	19.01%	50	35.46%	73	27.86%
Rarely	3	24	14.88%	19	13.48%	43	16.41%
Never	4	18		15	10.64%	33	12.60%
[DNO] Don't Know / Refused	9	0	0.00%	1	0.71%	1	0.38%
Total		121	100.00%	141	100.00%	262	100.00%

Q14_1								
RPEC information methods								
Which methods are you likely to use to get information from RPEC about retiree issues?... READ LIST and SELECT "YES" to ALL THAT APPLY								
Choices		PERS1			THE REST		COMBINED	
RPEC ´s quarterly newsletter								
Choices								
Yes	1	133	56.12%	133	55.88%	266	56.00%	
No	2	104	43.88%	105	44.12%	209	44.00%	
Total		237	100.00%	238	100.00%	475	100.00%	
RPEC ´s emails/digital newsletter								
Choices								
Yes	1	113	47.68%	124	52.10%	237	49.89%	
No	2	124	52.32%	114	47.90%	238	50.11%	
Total		237	100.00%	238	100.00%	475	100.00%	
RPEC ´s website								
Choices								
Yes	1	37	15.61%	35	14.71%	72	15.16%	
No	2	200	84.39%	203	85.29%	403	84.84%	
Total		237	100.00%	238	100.00%	475	100.00%	
An RPEC podcast								
Choices								
Yes	1	9	3.80%	15	6.30%	24	5.05%	
No	2	228	96.20%	223	93.70%	451	94.95%	
Total		237	100.00%	238	100.00%	475	100.00%	
RPEC virtual meetings								
Choices								
Yes	1	19	8.02%	13	5.46%	32	6.74%	
No	2	218	91.98%	225	94.54%	443	93.26%	
Total		237	100.00%	238	100.00%	475	100.00%	
A RPEC member only online discussion board								
Choices								
Yes	1	8	3.38%	13	5.46%	21	4.42%	
No	2	229	96.62%	225	94.54%	454	95.58%	
Total		237	100.00%	238	100.00%	475	100.00%	
RPEC's Social media channels								
Choices								
Yes	1	6	2.53%	10	4.20%	16	3.37%	
No	2	231	97.47%	228	95.80%	459	96.63%	
Total		237	100.00%	238	100.00%	475	100.00%	
None / Don't get information (Do Not Offer)								
Choices								
Yes	1	16	6.75%	16	6.75%	26	5.47%	
No	2	221	93.25%	221	93.25%	449	94.53%	
Total		237	100.00%	237	100.00%	475	100.00%	
Refused to Answer (Do Not Offer)								
Choices								
Yes	1	2	0.84%	2	0.84%	4	0.84%	
No	2	235	99.16%	236	99.16%	471	99.16%	
Total		237	100.00%	238	100.00%	475	100.00%	

Q15**How often do you listen to podcasts?....**

Choices		PERS1		THE REST		COMBINED	
Almost every day	1	7	2.95%	14	5.88%	21	4.42%
A few times a week	2	11	4.64%	16	6.72%	27	5.68%
A few times a month	3	38	16.03%	34	14.29%	72	15.16%
I don't listen to podcasts	4	179	75.53%	173	72.69%	352	74.11%
[DNO] Refused to answer	9	2	0.84%	1	0.42%	3	0.63%
Total		237	100.00%	238	100.00%	475	100.00%

Q16**How likely are you to listen and subscribe to an RPEC podcast that addresses retiree issues?**

Choices		PERS1		THE REST		COMBINED	
Very Likely	1	18	7.59%	16	6.72%	34	7.16%
Somewhat Likely	2	40	16.88%	59	24.79%	99	20.84%
Unlikely	3	61	25.74%	53	22.27%	114	24.00%
Very Unlikely / Never	4	115	48.52%	104	43.70%	219	46.11%
[DNO] Refused to Answer	9	3	1.27%	6	2.52%	9	1.89%
Total		237	100.00%	238	100.00%	475	100.00%

Q17

READ CHOICES, if needed

During your working career, what kind of employer did you work for?

Choices		PERS1		THE REST		COMBINED	
A state government	1	120	50.63%	88	36.97%	208	43.79%
A city or town government	2	25	10.55%	19	7.98%	44	9.26%
A county government	3	40	16.88%	56	23.53%	96	20.21%
A school district	4	24	10.13%	35	14.71%	59	12.42%
A college or university	5	10	4.22%	16	6.72%	26	5.47%
A not-for-profit corporation or agency	6	1	0.42%	1	0.42%	2	0.42%
A private company	7	2	0.84%	5	2.10%	7	1.47%
A part of the federal government	8	4	1.69%	1	0.42%	5	1.05%
Independent care provider	9	0	0.00%	2	0.84%	2	0.42%
Other (SPECIFY)	10	11	4.64%	14	5.88%	25	5.26%
[DNO] Don't Know/Refused	99	0	0.00%	1	0.42%	1	0.21%
Total		237	100.00%	238	100.00%	475	100.00%

Q18**During your working career, were you a member of WFSE, AFSCME Council 2 or any other union?**

Choices		PERS1		THE REST		COMBINED	
Yes, WFSE	1	48	20.25%	32	13.45%	80	16.84%
Yes, AFSCME Council 2	2	60	25.32%	57	23.95%	117	24.63%
Yes, another union (specify)	3	38	16.03%	53	22.27%	91	19.16%
[DNO] I don't remember	4	71	29.96%	77	32.35%	148	31.16%
[DNO] Refused	9	20	8.44%	19	7.98%	39	8.21%
Total		237	100.00%	238	100.00%	475	100.00%

Q19**What retirement plan are you in?**

Choices		PERS1		THE REST		COMBINED	
PERS 1	1	237	100.00%	0	0.00%	237	49.89%
PERS 2	2	0	0.00%	169	71.01%	169	35.58%
PERS 3	3	0	0.00%	17	7.14%	17	3.58%
SERS 2	4	0	0.00%	11	4.62%	11	2.32%
SERS 3	5	0	0.00%	5	2.10%	5	1.05%
PSERS 3	6	0	0.00%	2	0.84%	2	0.42%
[DNO] I don't know	7	0	0.00%	21	8.82%	21	4.42%
Other (Please specify)	8	0	0.00%	7	2.94%	7	1.47%
[DNO] Refused	9	0	0.00%	6	2.52%	6	1.26%
Total		237	100.00%	238	100.00%	475	100.00%

Statistical Questions**QD101****I'm going to read some age ranges to you. Please stop me when we get to yours...**

Choices		PERS1		THE REST		COMBINED	
Below 65 (18-64)	1	0	0.00%	8	3.36%	8	1.68%
65-69	2	16	6.75%	41	17.23%	57	12.00%
70-74	3	51	21.52%	72	30.25%	123	25.89%
75-79	4	85	35.86%	62	26.05%	147	30.95%
80 or over	5	79	33.33%	52	21.85%	131	27.58%
[DNO] Refused to say	9	6	2.53%	3	1.26%	9	1.89%
Total		237	100.00%	238	100.00%	475	100.00%

QD102**What is the last grade or level of education that you have completed?**

Choices		PERS1		THE REST		COMBINED	
Did not complete High School	11	3	1.27%	8	3.36%	11	2.32%
Graduated high school	2	38	16.03%	30	12.61%	68	14.32%
Attended Technical / Vocational school	3	13	5.49%	8	3.36%	21	4.42%
Attended some college, but no degree	4	41	17.30%	35	14.71%	76	16.00%
Graduated two-year college with Associate's Degree	5	32	13.50%	36	15.13%	68	14.32%
Graduated four-year college with Bachelor's Degree	6	47	19.83%	63	26.47%	110	23.16%
Obtained Master's / PhD / or other professional degree	7	62	26.16%	57	23.95%	119	25.05%
[DNO] Unsure / Refused to say	9	1	0.42%	1	0.42%	2	0.42%
Total		237	100.00%	238	100.00%	475	100.00%

QD106**Are you married, single, separated, divorced, widowed, or do you live with an unmarried partner?**

Choices		PERS1		THE REST		COMBINED	
Married	1	116	48.95%	114	47.90%	230	48.42%
Single	2	20	8.44%	29	12.18%	49	10.32%
Separated/Divorced	3	28	11.81%	44	18.49%	72	15.16%
Widowed	4	62	26.16%	47	19.75%	109	22.95%
Live with unmarried partner	5	6	2.53%	1	0.42%	7	1.47%
[DNO] Refused	9	5	2.11%	3	1.26%	8	1.68%
Total		237	100.00%	238	100.00%	475	100.00%

QD23

When it comes to politics, do you generally think of yourself as a strong Democrat, not very strong Democrat, strong Republican, not very strong Republican, or independent? (IF INDEPENDENT, ask) Would you say you are closer to the Democratic Party or the Republican Party?

Choices		PERS1		THE REST		COMBINED	
Strong Democrat	1	112	47.26%	108	45.38%	220	46.32%
Democrat, not strong	2	20	8.44%	14	5.88%	34	7.16%
Independent, Leans Democrat	3	20	8.44%	27	11.34%	47	9.89%
Independent	4	31	13.08%	38	15.97%	69	14.53%
Independent, Leans Republican	5	14	5.91%	16	6.72%	30	6.32%
Republican, not strong	6	6	2.53%	12	5.04%	18	3.79%
Strong Republican	7	21	8.86%	18	7.56%	39	8.21%
Refused/Declined to State (DO NOT READ)	9	13	5.49%	5	2.10%	18	3.79%
Total		237	100.00%	238	100.00%	475	100.00%

QD24

When it comes to politics, do you usually think of yourself as...

Choices		PERS1		THE REST		COMBINED	
Very liberal	1	49	20.68%	63	26.47%	112	23.58%
Somewhat liberal	2	48	20.25%	47	19.75%	95	20.00%
Moderate	3	64	27.00%	56	23.53%	120	25.26%
Somewhat conservative	4	39	16.46%	31	13.03%	70	14.74%
Very conservative	5	20	8.44%	26	10.92%	46	9.68%
Don't know/refused (DO NOT READ)	9	17	7.17%	15	6.30%	32	6.74%
Total		237	100.00%	238	100.00%	475	100.00%

QD300

And finally, to ensure we have a representative sample, could you please tell me

Choices		PERS1		THE REST		COMBINED	
Black / African-American	1	9	3.80%	12	5.04%	21	4.42%
White / Caucasian	2	201	84.81%	207	86.97%	408	85.89%
Hispanic / Latino	3	7	2.95%	3	1.26%	10	2.11%
Asian-American	4	0	0.00%	2	0.84%	2	0.42%
Native American	5	5	2.11%	1	0.42%	6	1.26%
[DNO] Other (Specify)	6	4	1.69%	5	2.10%	9	1.89%
[DNO] Don't know / Refused to say	9	11	4.64%	8	3.36%	19	4.00%
Total		237	100.00%	238	100.00%	475	100.00%

QD100

Caller - PLEASE ENTER GENDER BY OBSERVATION

Choices		PERS1		THE REST		COMBINED	
Man (Male)	1	117	49.37%	89	37.39%	206	43.37%
Woman (Female)	2	120	50.63%	149	62.61%	269	56.63%
Unsure	3	0	0.00%	0	0.00%	0	0.00%
Total		237	100.00%	238	100.00%	475	100.00%

To: RPEC Executive Board and Staff
Ben Hodapp, Assistant Director, Apscme Retirees

From: Susan Crumpton, Apscme Field Education Coordinator II

Date: May 1, 2023

RE: RPEC Listening Session Summary

Overview

The Retired Public Employees Council of WA (RPEC) listening session occurred on Friday April 14, 2023 for 2 hours with the intention of collecting more detailed member feedback, experiences and ideas to use in RPEC's strategic planning process. This is the second data collection tool administered by RPEC. A telephone survey conducted by Apscme IU and a paper/pencil survey mailed to the RPEC member addresses on file are the other two data collection tools used in this process. All of the above-mentioned data will be reviewed by the RPEC Executive Board in May and again in August to help the Council set strategic priorities and create goals, benchmarks and evaluative processes to move the organization forward.

Process

The listening session included a brief welcome and quickly moved into smaller breakout sessions of 10 or less participants. Each breakout session was staffed with 1 facilitator and 1 notetaker/observer. The facilitators were staffed by Apscme IU Education and Retiree Department staff and RPEC Executive Director. The notetaker/observers included RPEC staff and 1 executive board member. The members were divided into the following demographics for the small group discussion: current executive board members, chapter leaders, members up to age 70 in Retirement Plan 2 or 3, and members aged 71 and up in Retirement Plans 1 or 2.

Each group discussed the following:

- What RPEC does well.
- What RPEC could do better or differently.
- Member preferences for involvement.
- Barriers and incentives to becoming involved in RPEC activities.
- Ways members prefer to receive information.
- Technology preferences and concerns.
- Preferred ways to be involved in legislative action.

Demographics

All of the participants of the listening session were members of RPEC with one exception, a member of an Apscme retired group from another state and now residing in Washington. Of the 60 members who registered for the activity 38 showed up which is a strong 63% show up rate. The following represents the participant by age ranges:

- 1 participant aged 55-65 years old,
- 26 participants aged 66-75 years old,

- 10 participants aged 76-85 years old,
- 1 participant aged 86 or above years old.

RPEC made a significant effort to advertise the event to a variety of members in the hopes of hearing from those not currently in leadership roles with RPEC or local chapters. Additionally, RPEC focused on members who are numerically younger with personal phone calls to increase representation in the conversations. We did find that those recruited from this younger group of retirees had a high no-show rate. Gathering deeper understanding of their needs and preferences in future projects may require incentives or alternative approaches.

Summary of Discussions

Strengths and Improvements

It is clear from all the conversations in these sessions that members involved with RPEC appreciate the advocacy role RPEC plays on behalf of their members. The most visible and respected demonstration noted by participants is advocacy within the state legislative processes. Several participants described RPEC as an “amplifier” of their voices in critical decision-making spaces. Consistently, members in all small groups elevated the Legislative Lobby Day as strong element in the RPEC programming and something they wish to continue. The second most common strength upheld is information sharing on topics relevant to the retiree experience and changing needs. Clearly, retiree healthcare and pension issues come up with the most frequency, but there are other topics of interest that elevate and could be explored including caregiving supports and resources, issues that impact the financial well-being of retirees, and navigation of systems like Medicare sign ups and decision making. It is fair to say that members are used to seeing RPEC in the legislative arena but there are clearly more needs out there worth exploring.

In conversations with participants about what RPEC can do differently or improve upon there really is not a consistent thread, but participants provided many suggestions to enhance communication with RPEC members. To that end here is a list of the suggestions:

- Increasing visible work with other labor unions and advocacy groups that support retirees.
- Increasing support for chapters trying to run zoom or hybrid meetings including best practices for meeting engagement and formats, and technical support.
- Topical workshops for currently or soon to be retired workers so there is support in navigating the retirement systems, information and processes related to accessing needed life supports.
- Sharing the “RPEC story” in areas across the state.
- Contacting new retirees as soon as possible upon their retirement or before they retire.

Member Engagement

The first focused topic for the small groups probed for how members prefer to engage with RPEC and how RPEC can grow and support further member activism. By far the most consistent preference for member engagement is currently virtually. There is recognition that RPEC members continue to be impacted by the pandemic and, as a group, retirees are rebounding at a slower pace. There is significant thoughtfulness in the discussions around the natural barriers to in person gathering such as health concerns and mobility, but also consideration that some RPEC members have access issues preventing virtual engagement. Some common barriers mentioned include members without support in navigating

zoom or other platforms, connectivity issues, and members without emails. Despite these potential issues, the hybrid meeting format is mentioned consistently as the best possible solution, but member leaders are seeking support from RPEC in understanding best practices and how to support members with technology.

Additionally, there is acknowledgment that building relationships is easier and higher quality when you can come together in person. Local leader participants reflected that the in-person meeting numbers were not rebounding post pandemic and struggle to figure out how to approach this change.

Interestingly, participants made suggestions for valuable and appealing in person activities including parties or local holiday gatherings, community-based volunteer activities, or topical meetings on high interest issues. Not only do these activities bring people together to build relationships outside of a traditional business meeting, but they also allow RPEC retirees to demonstrate their value to the greater community and to each other. There are participants who recognize the value of in person meetings for members geographically close to the meeting space, but there are also significant barriers mentioned such as weather and drive time/traffic that are unique to any given geographic region. For those groups who discussed in person meetings, the incentives that work the best include high interest speakers or discussion topics, providing food and gift cards or raffles.

Finally, several members and leaders noted the increase in committees and workgroups within RPEC. This came up in several conversation as a positive way to engage members and provide meaningful guidance and support to RPEC staff and leaders on issues impacting members.

Communication and Technology

When participants discussed how they prefer to receive information, the responses consistently included email and the newsletters from their locals and the Council. They appreciate shorter communications that highlight new information and the ability to find answers to deeper topical questions as they have them. A couple leaders mentioned the website as not “user friendly” but identified the website as a valuable part of RPEC’s future. It was also clear that some members do not know there is a website which suggests the need for a communication strategy when the website is revamped.

Participants named other virtual tools such as Robo calls and texts as valuable mobilizing tools, but the conversations lacked recommendations for using other virtual platforms such as Facebook, Instagram, YouTube, TikTok, or Twitter. This may align with the generational preferences for communication and the low participation from those newly retired or 65 and younger. This is an area that will need deeper conversation with those not currently engaged with RPEC.

The most significant themes during the communication conversations are that all RPEC communication needs to be multi-modal to overcome barriers to RPEC news/information. For example, when constructing an online newsletter with a hyper link named “click here”, it is recommended that a printer friendly version available with visible weblinks. Lastly, staff awareness of generational trends and needs is critical in both the discussions and designing communications compatible with the wide variety of member needs.

Legislative Action

Participants with either awareness of or past participation in any of the legislative activities with RPEC see high value in these continuing. Both the Legislative Day and the RPEC staff legislative updates were noted as powerful engagement and awareness tools. There is an appetite for connecting with state legislators via email or letters/postcards and some who enjoy a good phone bank. While there is consistent naming of Medicare and Social Security as key federal issues of interest, there is much less feedback or ideas on what engagement would look like at the federal level. Most participants did not have experiences to draw on; however, their ideas for virtual or remote activities for state actions should be easily transferable. One participant mentioned the need for a mini-toolkit to assist members in engaging in virtual/remote or in person legislative activity.

Conclusion

In conclusion, the RPEC listening session was a positive experience for those able to join the discussions. Members appreciated the opportunity to share their thoughts and ideas for RPEC and seemed excited for the future of the organization. They identified strongly with the valuable work RPEC does for its members legislatively and on topics that impact the daily lives of our retirees. There is clearly an appetite for growing the member engagement, but a need for help in coming up with those strategies. There is also a call for more supports in transitioning to virtual settings while wanting to uphold the best practices of union solidarity and community in person where feasible. The largest hole in the conversation stems from the lack of participation in the younger demographic. We simply do not have enough information from them and RPEC will need that in order to grow the membership over time.

Recommendations

- Increasing visible work with other labor unions and advocacy groups that support retirees.
- Increasing support for chapters trying to run zoom or hybrid meetings including best practices for meeting engagement and formats, and technical support.
- Topical workshops for currently or soon to be retired workers so there is support in navigating the retirement systems, information and processes related to accessing needed life supports.
- Sharing the “RPEC story” in areas across the state.
- Contacting new retirees about RPEC as soon as possible upon their retirement or before they retire.
- Design multi-modal communications.
- Continue the website redesign project currently underway.
- Exploring the needs of new retirees in alternate listening or survey opportunities with a focus on virtual platform usage, communication preferences, resonant issues and preferred engagement methods.
- Engaging members in Federal/ State actions that directly impact retiree health, well-being, and financial stability.
- Provide mini-tool kits for remote political advocacy.
- Continue to mobilize members for in person lobbying activities and actions.
- Conduct trainings on generational trends, preferences and needs for staff and leaders.



2023 Retired Public Employees Council (RPEC) of Washington

AFSCME Chapter 10

Written Membership Survey Key Findings

July 2023

Overview

In April, AFSCME Retirees partnered with RPEC to send a written membership survey to all current members.

To date, more than 1,500 member surveys have been returned. This survey, along with the scientific membership poll and strategic planning listening session, were designed to help the RPEC Executive Board better understand the needs and opinions of members as the foundation for developing a strategic plan.

Non-scientific written survey

The written survey was administered as another means of gleaning insights into member preferences. This survey was never conceived to be administered as a scientific survey. For validity purposes, findings that align with the scientific poll may have more merit than those identified strictly through the written survey.

Please keep the following in mind as you look at this summary and the attached data, which includes all respondents.

- RPEC members self-selected to respond to this survey. Generally speaking, those who typically respond to surveys like this are already active or semi-active members. Thus, the results do not necessarily reflect the opinions and preferences of new or disengaged members.
- Because respondents self-selected to participate, there is no way to ensure the universe of respondents matches the demographic breakdown of RPEC's membership. In scientific surveys, efforts are made to ensure the pool of respondents matches our pool of members. Demographic characteristics include: gender, age, DRS plan, region, etc. In this instance, the majority of respondents are Plan 1 retirees.
- In scientific surveys, questionnaires that are returned incomplete are not tallied for consideration. However, because so many surveys were returned incomplete, the decision was made to tally all returned surveys. In some instances, some questions were answered by as few as 10 members.

Demographic profile of respondents

- The majority of respondents were state retirees (54.38%).
- 61.18% of respondents are DRS Plan 1 retirees.
- 92.24% are not Council or Chapter leadership.

High-level take aways

- All respondents, regardless of DRS plan, answered the questions similarly, with one slight caveat. Of the Plan 2 and 3 members who responded, 79.09% said that protecting federal retirement should be RPEC's top priority. Looking at the pool of all respondents, this priority was only a slight majority of all RPEC members at 52%.
- Overall, RPEC's membership wants to participate in actions to protect and expand their retirement security.
- The only major difference in this priority is that those vested in Plans 2 and 3 believe that is best done by protecting federal benefits like Social Security & Medicare. Conversely, Plan 1 retirees want the restoration of a permanent cost-of-living adjustment (COLA).
- Members value RPEC's advocacy efforts to protect healthcare and retirement security.
- Members believe RPEC maintains adequate touch points with members through email, written communication, meetings, and other offerings.
- Members believe that electing pro-retiree candidates is pivotal to retirement benefit security.

Member priorities

- 72.14% of RPEC members say their pension is the greatest source of their retirement security.
- Members were divided on what RPEC's top priority should be, with 52.98% saying they wanted to protect federal benefits and 45.03% saying they wanted to restore the DRS Plan 1 COLA. (Plan 1 members, who were the majority of the respondents, prioritize securing a recurring COLA).
- 91.96% said that they valued RPEC's advocacy for member health care & retirement security.
- 79.41% said the best way to protect public service retirees' benefits is by electing pro-retiree candidates.

Communication preferences

- Members prefer RPEC communication through the quarterly print newsletter and emails (68.19% and 31.52% respectively). However, be aware that the print communications preference may be a reflection of "medium bias" – meaning that sometimes respondents prioritize print as a communications preference because they have received a printed survey. The newsletter and email communication were also cited as communications preferences in the scientific telephone poll and the strategic plan listening session.
- 92.26% say they hear from RPEC about the right amount, with only roughly 7% saying they don't hear from RPEC enough, or that they hear too much from the Council Office.
- While one might tend to see the combined 75.94% of respondents saying they rarely or never go to RPEC's website as a negative, 24.06% say they do visit the website, which by industry standards is quite high.
- 43.79% say they are active on social media (with 19.81% saying they are on social media on a daily basis). Of those active on social media, 86.53% use Facebook. 54.99% say they are not active on social media.

Membership participation

- 68.19% prefer reading RPEC's quarterly print newsletter while 19.78% prefer to attend chapter meetings.
- 68.10% want to participate in legislative advocacy actions such as calling their elected leaders.
- 35.03% say they would like to participate in virtual meetings and trainings. 69.18% said they would not participate in online forums and 71.30% said they would not listen to an RPEC podcast. Based on feedback gleaned from the scientific telephone poll and the strategic planning listening session, it appears that some members have no familiarity with online forums or podcasts. Thus, if RPEC were to explore these engagement strategies, the Council Office will need to educate members about these tools and build usage of them.

Conclusions

While this was not a scientific survey, the findings are useful when considered in concert with those of the scientific telephone poll and strategic plan listening session. The survey only gleaned insights from existing members. Work should continue to ascertain the preferences of new members to support engagement and retention. The Council Office may want to consider initiating this survey, again, in 3-to-5 years now that baseline data exists.