

SUCCESSFUL LEGISLATIVE ACTIVITIES BY STATE

ALABAMA

All chapter presidents receive a list of Legislators with phone numbers and addresses. Information is shared with chapter legislative committee chairman and others so that they may contact their legislators.

A Lobbying day is scheduled (when possible) for AERA members to see their legislators at the State Capitol.

Executive Director hosts a reception (when possible) for the members of the Legislature.

Arizona – Luci Messing

Lobbying Activities

- Annual lobbying training (every aspect of lobbying covered)
- Multiple AEA Retired Days at the Capitol
- Meetings with legislators at the Capitol (small groups meet with their reps)
- Testify and observe at committee hearings (We must use our voice)
- Observe proceedings from the gallery (Representatives need to see us)
- Action Alerts issued on a timely basis (Members respond immediately)
- Request to Speak System utilized frequently (This has become a powerful tool)
- Utilize legislator contacts (members assigned to specific representatives)
- Meetings with Legislators in the off season (one on one or small groups)
- Regular Emails to Representatives (not just during the legislative session)
- Regular phone calls to Representatives (not just during the legislative session)
- Postcards (We have begun using these for a variety of reasons)
- Attend Town Halls (Our representatives need to see us at events)
- Utilize members as liaisons to Legislative Districts (Become a trusted source)
- Partner with Coalitions (Build for power)

CALIFORNIA

- 1.) Lobbying to U.S. Senate and House of Rep. members to pass the CARES Act and to ensure Education Stabilization Funding in the HEROES Act. Encouraging individual members to contact Senate and House members (telephone, email, letter) to pass legislation.
- 2.) Activating the RAN (Retired Action Network) multiple times to get federal legislation passed.
- 3.) Activating the RAN (Retired Action Network) to advocate to the governor and California state legislature to hold education funding harmless for the 2020-2021 school year. This was a successful effort.
- 4.) Joining CTA in contacting voters in key Congressional races to vote for education friendly candidates--phone banking, postcards, texts, (Retired members involved).
- 5.) Joining with NEA-Retired in the Get 10 for Ed campaign to contact voters to vote for NEA-approved candidates, (Retired members involved).
- 6.) Massive involvement in the California Proposition 15 campaign which attempted to alter corporate & commercial property tax rates, correcting tax inequity.
- 7.) Member participation (phone banking & postcards) to Georgia voters, encouraging a vote for Democratic Party candidates for the U. S. Senate.
- 8.) Campaign participation (phone banking, email, door knocking) in support of school board candidates at the local level--many victories achieved throughout California. (District names and successful candidate names, for example, available if necessary.)
- 9.) Continued lobbying of U. S. Senators and House of Representatives reps. in support of repeal of GPO/WEP. This information and access to legislative contacts is provided to Retired members statewide through the CTA/NEA-Retired *ADVOCATE* newsletter.

These are activities that have actually been done and can be verified.
Orval Garrison, CTA/NEA-Retired President

CONNECTICUT

In Connecticut, the CEA Legislative Committee plans a yearly Retired Teacher Lobby Day for our members and other retired teacher unions with our state legislatures.

The CEA CPAC is currently chaired by a retired teacher.

Myles Cohen

Federal

Contacted:

Anita Lang, NEA Director from Federal and a wonderful union sister/friend

Michael Priser by email-mwpriser@yahoo.com-very helpful

Trudy Pollard by email-thpollard47@gmail.com -very helpful but referred me to Michael Priser

FEA R has about 580 members. (The entire Federal affiliate has only about 6000 members.) Michael is trying to organize the retired members. He recently retired from President of FEA in 2019. Steps are moving in the right direction to bring a sense of community to their retired members who may be residing all over the United States and the world.

They have started an electronic monthly FEA-R Newsletter which includes highlighting information connected to education and/or retirement concerns. Prior to the Newsletter members were encouraged to sign up for Education Votes and the EDAction newsletter through the FEA Journal. The newsletter has several purposes including getting their retired members involved in political action.

They must be careful NOT to work with any ACTIVE members politically due to the Hatch Act, but retirees are a different story. Most of the political action items included involve issues that affect retirees and federal employees. Items often include links to Education Votes, if the NEA addresses that issue. Information is garnered through news outlets and NEA sources, and the National Association of Retired Federal Employees. This organization also has a lobbyist who informs Michael of issues as well.

A Google survey was sent to all retired members to see what was important to them. The results were: Medicare, Social Security, and the GPO/WEP.

Zoom webinars on Member Benefits and Financial Planning, respectively, for members have been implemented this year and the next one will probably be on how to be an effective lobbyist.

GEORGIA The GAE-Retired Legislative Plan 2020

A motion was made by the GAE- Retired Legislative Committee at the 2018 Spring All Member Conference to establish the GAE-Retired Rapid Response Team using the

NEA Leadership Competencies for Advocacy. The NEA Rapid Response Team was our model. Our focus would be at the state level, including active issues when called upon. Nationally, with information from NEA we would continue to lobby for retired legislation personally and through resources from NEA. With training using the funding from the NEA Grants, we were prepared to now conceive our legislative plan as year-round and not simply during the session.

Our **Legislative Plan for 2020** continued with the Rapid Response training/focus. With the emergence of Covid-19, and national elections, our initiatives were taken from the state plan, catapulted us (with all deliberate speed) to be an integral part of the national election scene. Zoom meetings became the order of the day.

The Georgia January 5 run-off elections included traditional means as well as emails, thousands of texts, and hustling, 4500 mailed flyers, Curing ballots and working with constituency groups such as, The Georgia Democratic Party, Fair Fight Georgia, canvassing, County Democratic Parties, working at the polls, writing Op-Eds and Letters to the Editors, Faith-Based Organizations, AFT, and other union groups.

GAE-Retired Legislative Plan 2020
Antonette “Toni” Smith, President
Lynda W. Smith, Legislative Chair

IDAHO

Our efforts for Idaho Education Association – Retired are minimal.

When called upon by our state GR staff, we are willing to staff phones or fill seats at hearings at the Idaho Legislature. Dick Chilcote

INDIANA Best Practices for Lobbying and Covering Issues Instate

1. Present issues such as pensions and health care at ISTA-Retired State Council and ISTA's Summer Leadership Conference.
2. Include retired issues in statewide publications.
3. Contact individual legislators.
 - a. Call legislative assistants.
 - b. Call House/Senate Phone Center and leave a message.
 - c. Send emails and/or handwritten notes.
 - d. Leave a note at Chamber Doors.

4. Schedule appointments with individual legislators (when possible).
5. Log onto ISTA-in.org and follow prompts to send messages to legislators.

KENTUCKY – Brenda McGown, President Kentucky Retired

1. They are presently locked out completely due to COVID as far as meeting with legislators face to face. They are working on an email system to contact legislators and a phone program.
2. In the past they were successful with mass groups going to the capitol with:
 - Marches
 - Delivering petitions
 - Attending Committee Meetings
 - Face to face meetings with legislators

MAINE

MEA Retired works with MEA on lobbying. We work with MEA lobbyist John Kosinski. Retired are also represented on the MEA Government Relations committee with active teachers. MEA Retired has a Legislative Chairperson and a legislative contact in each of the 16 Affiliates. We also have a group that can get to Augusta on short notice to attend a hearing to give testimony. MEA has a program called *Under the Dome* which provided timely Legislative updates, announces upcoming public hearing, and provided help for those going to testify. MEA has a list serve of all MEA Retired members that have e-mail for fast, timely distribution to about 3500 of our 5000+ members. We have a bimonthly newsletter called the *Clarion* that goes to all members which contains Legislative information. Each year we have done lobby days in Augusta and have done Rallies in different areas in the state.

This year 2021 all committee public hearings will be on ZOOM so members do not have to drive to Augusta, and this should help with participation.

Activities MEA Retired participate in are numerous and varied. Examples would be post card campaigns on bills/issues, phone banks for specific Legislators, contact legislators by e-mail ,phone, snail mail on bills, inviting local legislators to meetings, lunch, be quest speaker, house parties. Attend monthly Legislative meeting in different areas in the state. Direct e-mails to all affiliated with talking points, contact info and direction and what and when to do something.

MEA Retired has a member on the MEA Board of Directors so our voice is always heard, and we are included in legislative issues. MEA Retired issues are in the top tier of MEA priorities each year. We get a great deal of help from the Government Relations staff.

MASSACHUSETTS Teachers Association

GOVERNMENT RELATIONS COMMITTEE - ACTIVITIES

The members of the Government Relations Committee have worked collaboratively with the Government Relations team to develop a proposed 2021-2022 legislative agenda.

The development of the agenda was an intensive, member-driven process that included significant input from educators across the Commonwealth to ensure that our legislation reflects the hopes and aspirations of our membership. The process commenced in September when the process and timeline for developing the agenda were established. In October, the committee began to solicit specific legislative proposals from MTA members. In total, 155 members submitted ideas, with related or similar ideas subsequently being combined into single proposals, resulting in 32 unique policies to be considered by the GRC. who recommended filing 16 pieces of legislation. The Board approved this recommendation on December 5, 2020.

MEMBERS WERE AFFORDED THE OPPORTUNITY TO PROVIDE IN-PERSON TESTIMONY IN SUPPORT OF THEIR SUBMISSIONS AT A GRC HEARING IN NOVEMBER AND MORE THAN A DOZEN MEMBERS ATTENDED THE HEARING TO ADVOCATE FOR THEIR PROPOSALS. AFTER THE HEARING, THE GRC, IN CONSULTATION WITH GR STAFF AND OTHER MTA DIVISIONS, CAREFULLY REVIEWED EACH SUBMISSION AND PROCEEDED TO CRAFT A PROPOSED LEGISLATIVE PACKAGE. THE PROPOSED AGENDA ENCOMPASSES WIDE-RANGING ISSUES THAT TOGETHER ARTICULATE OUR SHARED COMMITMENT TO PUBLIC EDUCATION, FAIRNESS FOR ALL WORKERS IN OUR COMMUNITIES, AND A SECURE RETIREMENT FOR PUBLIC-SECTOR EMPLOYEES. [ENSURING A DIGNIFIED RETIREMENT](#)

Legislative Agenda 2021-2022

Fair and Dignified Retirement

- Immediately increase the COLA base from \$13,000 to \$18,000 and over time raise the base to align with Social Security's maximum allowable benefit for an individual worker (\$36,132 in 2020).
- Freeze municipal retiree premium contribution rates.
- Cap out-of-pocket expense for non-Medicare eligible retirees

Retirement Enhancement

- Provides MTRS members with an option to purchase up to 5 years in age and years of service (or a combination not to exceed 10 years).
- This opportunity would be open to MTRS members who agree to purchase their time and retire during the limited enrollment period.

- Mandatory backfill language would be included to avoid teacher shortages.

MTRS RetirementPlus

- To correct a RetirementPlus enrollment issue impacting certain members of the Massachusetts Teachers' Retirement System.

MICHIGAN – Kay Walker-Telma President Michigan Retired

1. Due to COVID they haven't done much with the State Legislators – there are individual members who are active in their own areas. During the summer and fall there were many members involved in post card campaigns and a Town Hall with Senator Gary Peters, who was then a candidate. MEA Retired members were active in the NEA activities during the GOTV project leading up to the November election.

2. There is a group of approximately 24 retired members that have been trained to lobby. The MEA staff call them, and they would come to Lansing to talk with legislators as needed. One of the MEA Retired members is chair of the state MEA Retired Committee on Legislation. There used to be Lobby Days when MEA Retired members would come into Lansing to talk with their Legislator, this was over and above the group that was trained.

MONTANA – Moffie Funk, State Legislator, President Montana Retired

1. As a legislator Moffie is very involved in the legislative process in Montana. The retired group in Montana keep working to have their voices heard and there is a Montanas for Education group. It is difficult in Montana because it is a very red state, very pro-Trump. They lost 9 seats at the state level and the Governorship. They had a Democratic Governor for 16 years. There are six bills on the floor, including bills regarding guns and right to work. In national politics it was about defeating Nancy Pelosi and Chuck Schumer.

NEVADA

Over the past two Legislative Sessions the Nevada State Education Association-Retired has had many lobbying efforts that have met with some success.

We have hosted Forums on Healthcare.

Testified in both the Senate and Assembly on HealthCare, keeping personal information private, teaching Civics, funding our schools and other Public Education and Public Employee issues.

We have also had Lobby Days at the Legislature. We make individual appointments and talk one on one with our legislators or make team visits to Committee members that are hearing bills that concern our issues.

We also have had email campaigns, postcard campaigns (this is more about the visual rather than the actual postcard message), and a texting campaign. We have also been active in campaign efforts such as canvassing, phone banking, and texting campaigns where we have the opportunity to talk with candidates,

Since the pandemic we have also had several Zoom meetings to talk about issues especially affordable healthcare.

NEW JERSEY Retirees' Education Association

Lobbying/Election Activities April - Nov. 2020

The NEA and NJEA PAC Committee endorsed Joe Biden/Kamala Harris for President and Vice President. NJEA PAC also endorsed 11 candidates for the 12 New Jersey Congressional District Representatives. We were successful in electing 10 of the 11 endorsed candidates. Despite a very aggressive campaign for Amy Kennedy in LD 2, incumbent Jeff Van Drew was re-elected.

The NJREA GR Committee worked with the NJEA active members in all 40 New Jersey legislative district elections.

Activities:

Phone banks in all districts: Using our NJEA membership lists, members called all members to encourage voting for endorsed candidates. Many members signed on with NEA and did phone banking to other states.

Wrote letters to the editors of local papers supporting our candidates.

Mailing postcards: Retirees wrote and mailed postcards to members advocating for votes for endorsed NEA and NJEA candidates.

Retirees did **NO-contact canvassing** in several LD districts. They joined actives as well as students in this endeavor. Retirees participated in weekly "sign holding" activities in strategically identified high volume travel areas. They supported candidates in walkabouts.

Members had **conversations** with family and friends to encourage them to support our candidates. Some were involved with the NEA Contact 10.

New Jersey was **all Vote by Mail**. We did additional phone calls to remind members to mail their ballot promptly or via USPS, drop-off boxes, or polling place (only for handicap voters) or the county election office.

Finally, the NJREA GR Committee and retirees are extremely proud of U.S Representative Andy Kim (NJ LD 3) for his immediate effort to assist US Capitol police

and staff to get rid of the debris left by insurgents of January 6 and secure the Capitol building.

NEW YORK

Our 240,000 retirees are invited to join with the in service lobbying activities. We also participate in retiree phone banks, post card writing and door knocking (when safe).

We are a merged state, and our number of NEA Retired lifetime members is 3866. All our NEA retired work with other statewide retirees and ins service members on statewide and national initiatives and we meet with in service leaders as well as our statewide legislative department which supports both the 410000 in service members and all retirees.

Many of us also attend AFL-CIO local labor council meetings and receive emails and attend virtual meetings with them.

Florence McCue
NY

NORTH CAROLINA Retired School Personnel response

NCRSP is excited to report that it has just completed its first year of implementing a more strategic public policy effort than it had practiced in the past. The three main components are below, and we enlist our NCRSP leaders, staff, lobbyist, and members in this effort. This approach constitutes a big step forward for NCRSP and its retiree members, and we remain committed to pursuing this multi-stage strategy for achieving advocacy success.

1. Putting Retirees First!

While NCRSP is proud of its affiliation with NCAE and NEA, we also recognize NCRSP's unique value proposition is serving the needs of our members, who are retirees. Our public policy success relies on using its limited resources to communicate this distinction to policy makers. We began this in 2020 and continuing to strengthen our unique message in 2021 with the succinct internal and external phrase, "Putting Retirees First!"

As part of our "Putting Retirees First!" initiative, we have successfully partnered, on like-minded issues, with the state retired government employees' group, enabling us to broaden our outreach on retiree issues.

2. Bipartisan Approach in Working with Policymakers

NCRSP understands and accepts that, no matter which political party is in the majority, legislative success requires 50% plus 1 vote. In North Carolina, both chambers of the General Assembly are controlled by Republicans. NCRSP is pivoting from its traditional approach of developing mostly Democratic relationships and broadening its efforts to develop and nurture relationships on both sides of the political aisle.

The expectation of a Blue Wave did not occur here in North Carolina. Therefore, it is more important than ever that NCRSP move forward in a bipartisan manner, by educating and developing productive relationships with all Freshmen legislators, majority, and minority party leaders in both the State House and State Senate, and all members of the relevant committees. This approach represents a paradigm shift for many of our members. We have conducted leadership training to help our members appreciate the power and importance of constituent relationships. This year, we are spreading this approach more widely to all NCRSP members across the state. As part of this effort, we are teaching our retirees the difference between policy and politics and to put policy before politics when they advocate on retiree issues.

We have a positive relationship with the Governor's office (a Democrat), and we continue to nurture that. In addition, we are working on identifying opportunities to build a more productive relationship with the State Treasurer (a Republican).

3. Build Champions

We have multiple legislative supporters of NCRSP's policy priorities, and we appreciate their support. NCRSP is focused on converting existing and newly identified supporters into champions. Such champions differentiate themselves from supporters by pro-actively seeking and identifying opportunities to help NCRSP's retirees achieve policy goals, by engaging their legislative peers including those with the authority to advance NCRSP's policy agenda, and by speaking out specifically about the needs and interests of NC's retired school personnel.

Willie Ramey: President: NCRSP Anne D. DarConte: NCRSP Lobbyist

Pat Randall Dr Willie Stevens (NEA-Retired Legislative Committee)

PENNSYLVANIA State Education Association Retired

Contacted

President, Mary Moran, Vice President, Patsy Tallarico, Secretary, Carl Rieffan, and Retired Legislative Committee Chair, Steve Hermanos-all by email

Referred to Jennifer Statler, Assistant Director of Government Relations, by telephone

Retired PACE Chair, Anne Loeffler, by telephone

Strategies that work in Pennsylvania include **“The Political Institute”** -a weekend set aside every other year to bring members together for large group and break out seminars on political action. Speakers include, but not limited to the PSEA Government Relations staff, members of State and Federal General Assemblies, Governor, candidates for elected positions, political updates on hot topics, and usually a renown political analyst. Activities during these renown institutes may include training for lobbying, letter writing campaigns, taking action digitally, panel discussions, etc. Retirees may attend the Political Institute.

Another effective strategy is the **Gettysburg Leadership Conference** which brings together every July on the Gettysburg College Campus about 1300 members for a week-long training. There is an entire track for Government Relations and an entire week-long track for retirees. Activities include field trips to our nation’s capital or our state’s capitol to lobby in teams; both state and federal senators, congressmen, and candidates are invited to visit during the week to hold formal and informal discussions, panels, conversations with members. There is a huge weeklong PACE fundraising campaign at every meal and an auction for PACE on one evening. There are also Democratic and Republican member breakfast caucuses during the week. Retirees may attend all events.

A statewide **PSEA Retired Conference** is held annually (except for COVID-19 2020) and a **PSEA Retired House of Delegates** is also conducted. Both events include legislative updates.

One of the most effective strategies occurred during our last gubernatorial election. Members, retired included, were offered a training and a **stipend** to go “door to door” throughout the state encouraging people to vote for the Education candidate.

Another strategy is at least once a year, members, including retired, are brought into the state capital, Harrisburg, for **“Lobby Days”**. They give a briefing and talking points in the PSEA Board room and then set loose in the capital to visit their respective congressmen to lobby on germane issues.

ACES Program-Advocates for Children and Education-is a grassroots advocacy effort that empowers members (retirees included) to advocate for schools, students, and education professionals. ACEs receive advanced trainings on advocacy and lobbying and frequent policy briefings to help them to communicate with legislators. They work in teams to ensure that legislators understand what is happening in schools and classrooms and with our members.

Take Action Now; Contact your Legislator websites with just a click.

Retired members also participate in phone banking, postcard writing, member to member campaigns and individual lobbying in the home offices.

Pennsylvania also has a statewide retired newsletter called The Statement. Often state and federal legislative issues are discussed in this format as well. In addition, each of

Pennsylvania's 12 regions have their own retired governance modeled after the retired state governance. Each region sends delegates to the PSEA Retired House of Delegates.

TENNESSEE

Facts do not vote; people do!

The most essential skills for effective lobbying are the ability to establish rapport with the individual you are lobbying and the ability to communicate clearly and concisely about the issue(s) under discussion. Retired teachers have a distinct advantage in both skills due to their profession and their work in education. Prior to the initial contact with the individual, learn as much as you can about this individual. Information is readily available about the interests, activities, and involvement in community activities. Find areas of commonality that can be used to open the dialog and establish rapport. Does the individual have an expressed interest in the area in which you will be addressing? Does this individual serve on a committee or governmental body that has influence on your issue(s)? The initial contact is vitally important and should be made as soon as possible after the individual is elect/appointed to the position just to introduce yourself and before an issue has developed that needs addressing. Provide the individual with your contact information and request the "best method" of future communication with the individual. Always follow up with a short communication expressing gratitude for the meeting, encourage future communication opportunities and your willingness to meet and supply information.

Know the issue(s) you are addressing and how it impacts the constituents of the individual. Quoting statistics alone will not relate well; being knowledgeable about the specifics as related to the people who can vote for or against the individual is paramount. Have "stories" prepared about the issue and relate it to the individual. Discussing the bill by name /topic is usually sufficient unless there is more than one bill or bills of similar names; then have the bill number to reference in the discussion.

LISTEN. Communication is a two-way street. Pay particular attention to any questions or remarks the individual makes and address any issues raised. Be prepared to say you do not know if that is the case and commit to getting the information and getting back to the individual. **ALWAYS** follow up on any commitment you have made and thank the individual for the opportunity to have the meeting/discussion. Schedule a follow up meeting if possible and leave your contact information with the individual. Carefully monitor the progress of the bill as it moves through the committee structure and legislative body and be prepared to address any amendments that are placed on the bill.

After the vote is taken, thank the individual for supporting your position (if that is the case) by showing the positive impact it will have on the individual's constituents. If the

individual did not support your position, refrain from any language that may negatively impact your future relationship with this individual. Ask for future opportunities to meet and talk with the individual as there will be other bills that you want to address.

Remember it is Not about the LAST vote; it is always about the NEXT one!

Donna Cotner
Executive Director and Chief Lobbyist
Tennessee Retired Teachers Association
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dcotner@tnea.org

WASHINGTON STATE LOBBYING ACTIVITIES:

1. For the last four years, Washington Education Association-Retired (WEA Retired) has jointly lobbied with RPEC (Retired Public Employees Council) as our goals seem to align well.
 - a. We do joint training the morning of our scheduled lobby day divided by Legislative Districts (RPEC and WEA-Retired train together and get to know each other). Speakers include the Presidents of both groups and the chief lobbyist from both groups. RPEC has set up all appointments before our lobby day. We wear t-shirts, scarves or... to identify which retiree group we are with as lobby TOGETHER making a statement with joint concerns. That evening we have invited all law makers to a “healthy hors d’oeuvres” in a lovely, relaxed setting for general conversations.
 - b. This year because of COVID training will be Monday February 8th followed by a schedule time via ZOOM with our Legislators during the week of the 8th – 12th of February.
2. WEA Active lobby day
 - a. Retirees are invited to lobby with actives which many do. We are part of the team visiting our area’s lawmakers. Many times, we have a relationship with these legislators as we have lobbied them for years, so it is like old home week. This year of course was different. Training was followed immediately with a zoom time with our own Leg. District Representative and Senator.
3. After each monthly WEA Retired Legislative meeting, we are sending out a summary of what members should be aware of and possibly the need for action. It is named **Actively Retired**. Everyone who is a member receives it. Additionally, Washington’s President send out an **e-connection** every several weeks and a great paper publication, **Connections**, four times a year. All of

these have information on contacting their Legislature including emails, phone numbers, and committee assignments.

4. Rapid Response Teams have been organized to call upon members who live close enough to Olympia, Washington to show up for hearing and/or to testify. This has added to our readiness to step up and be available and be there!

WISCONSIN

Right now, WEAC-Retired's legislative best practices are sharing WEAC correspondence with active members by simple forwarding/resending or slight rewriting and sending out the information via email to our membership.

A Legislative /Coalition Committee has been in our C&Bs as long as I have been retired, but it has not been active for years. During our January Executive Committee Zoom meeting, I brought that one and another committee that also has not been active up for discussion. This spring, we will propose C&B amendments changing the committees' names and who will act as liaison from the Executive Committee.

I see the Legislative Committee as needing at least one member from each of WI's 7 Congressional Districts and who would be the liaisons between WEAC and the WEAC-R members in their CD's regarding legislative issues, be the experts on and the go-to people for being, and finding other, members willing to lobby in whatever form, be it via letter, phone call, office visits, or testimony at Budget and other hearings. Since WEAC has many coalition partners, this committee's members would also get connected with WEAC partner groups, but it would not have "/Legislative" in the name. I think both the President and Vice President should be liaisons to this committee.