



ALLIANCE FOR RETIRED AMERICANS
FIELD PROGRAM for 2008

OVERVIEW

Retiree Civic Action Makes a Difference

The Alliance for Retired Americans is poised to make the difference in issues of concern to retirees and seniors in 2008 by motivating our members on our key issues through **issue education, earned media, and voter mobilization**. In battleground states, the Alliance's membership comprise a significant percentage of the voting population and trust the Alliance to select candidates that will protect their interests. By building on the lessons learned in 2004, and our successes in 2006, the Alliance has developed a plan to leverage senior activism into a 2008 democratic victory.

Grassroots Capacity

The membership and leadership of the Alliance is a powerful grassroots engine with the ability to move its **3.5 million members** and over **1,300 state affiliated organizations**. The Alliance has the edge to mobilize our own members to make a decisive difference in the leaders who address senior and retiree issues. Furthermore, the Alliance is one of the only organizations that links a national program with a premier state structure with locally organized grassroots capacity to implement a senior-specific education action plan.

Structural Capacity

The Alliance has created a comprehensive Field Plan to work with states on 4 different strategies. The ultimate goal of the Field Plan is to utilize the momentum of the 2008 elections to build our state Alliance in way that:

- (1) Creates a year round mobilization structure that can help win elections and legislative initiatives
- (2) Advances a legislative agenda that benefits seniors,
- (3) Supports our affiliates and individual members,
- (4) Invests in current and potential leadership, and
- (5) Grows our long-term grassroots power

OUR ISSUES – HOW WE MOVE THE PURSUADABLE VOTE

Social Security Privatization: Polling and surveys show that the majority of seniors, regardless of party affiliation and other factors are against the creation of private accounts. With this rare unity around an issue, we will remind seniors that (1) Social Security privatization is still a threat, (2) **that Senator McCain was and is a chief proponent of dismantling Social Security**, and (3) privatization will only benefit those with current wealth and resources.

Medicare: PART D and Medicare Advantage Private Policies: The Alliance has a 3 part message on Medicare: (1) Part D Rx was deliberately designed to be confusing and unreliable to the consumer and distrusted by the taxpayer, (2) Medicare Advantage costs more to the taxpayer and delivers less, (3) privatization of Medicare threatens the only national health care program that has worked well for 43 years and is becoming an entitlement program threatened with extinction.

An Economy in Crisis: Many seniors and retirees are greatly disturbed by the fiscal mess in Washington DC. They do not want to leave a legacy of debt and destruction of social programs to their children and grandchildren. Senior watch as entitlement programs are chipped away and degraded at the same time that tax cuts are given to wealthiest Americans. The Alliance can pose the following question to the general senior community: Is this Administration using your tax dollars in the most efficient way? Coupled with the Social Security and Medicare Part D messages, this is powerful picture to paint of how Washington has assaulted the retirement of security of seniors and retirees. By illustrating the “big picture” of Administration spending patterns, shifting social policy, the lagging American economy and the affects of globalization, the War on Terror, and the declining quality of retirement, the Alliance can make a strong case for new faces in Washington.

These and other issues are cross-generational policy matters. Survey research consistently demonstrates that retirees are deeply concerned about misguided health care and economic policies that will ultimately saddle their grandchildren and great grandchildren with insurmountable debt and only serve to erode their economic and retirement security. *Initial research conducted for the National Alliance by Celinda Lake Polling demonstrates that only 12% of voters aged 65 and over believe their children and grandchildren will be economically better off than they were*

STRUCTURE:

Strategy 1: The Retiree Zone Coordinator Program

Level 1 states will implement the retiree zone coordinator program. Using the established Retiree Zone Coordinator structure, first implemented in the summer of 2004 in Pennsylvania and Ohio, the Alliance will recruit and train 3 to 15 retiree zone coordinators in each target state to carry out all aspects of our Field Program. Under the zone structure the Alliance state organizations will be split their state into organizing zones, which represent clusters of counties with similar demographics. Each zone will be assigned to 1 to 2 retiree coordinators that resides within its borders and has an in depth knowledge of the MMA law, the Social Security debate, and other key issues. All Alliance Retiree Zone Coordinators will represent the face of the Alliance as experienced volunteers that are committed not only to moving the program in their zone, but building their state's and National Alliance's name recognition and reputation in the process.

Strategy 1 States: States with Staff AND Retiree Zone Coordinators

Arizona***
Connecticut
Florida
Georgia
Ohio***
North Carolina
Pennsylvania***/*
Wisconsin

Strategy 2 States: Traditional Field Mobilization Program / Staff ONLY

Level 2 states will run a traditional Field Mobilization election year program (outreach, education, mobilization), but the program will be staff driven and will focus more on particular CD races or geographic areas, rather than having a full statewide presence like the retiree zone coordinator program.

Strategy 2 States: States with ONLY Staff

California****
Colorado *
Illinois****
Iowa
Oregon
Maine
New Hampshire*
New York****/***
Washington*

Strategy 3 States: Traditional Field Mobilization Program / Consultants

Level 3 states will run a traditional Field Mobilization election year program (outreach, education, mobilization), but the program will be staff driven by temporary consultants who will work in coordination with State Alliance leadership and pre-existing programs. Consultants will focus their work on particular CD races or geographic areas, rather than having a full statewide presence like the retiree zone coordinator program.

Strategy 3 States: States with ONLY Temporary Consultants

New York*
New Mexico*
Nevada*
Missouri*
Indiana*

Strategy 4 States: National Campaign Focus with State Implementation / No Staff

Level 4 states will be worked with on state by state basis.

Strategy 4 States: States With No Staff, Retiree Zone Coordinators, or Consultants

Vermont
Maryland
Hawaii
Nebraska
Minnesota
Texas
Rhode Island
West Virginia

Key

**** State Funded Executive Director
*** State Also to Receive Temporary Consultants
* Staff Position Not Filled

FIELD PROGRAM STRUCTURE

The Alliance's Field Program will focus on 3 main objectives: (1) Grassroots Outreach (2) Communication & Education, and (3) Mobilization.

OBJECTIVES:

Outreach: *We must ensure that all of our members are educated on the issues that affect them and express and exercise that knowledge.*

1. The Alliance will coordinate absentee ballots to our membership and the general senior community. By concentrating our efforts on an Absentee Ballot application collection system we can capture names and addresses of approximately **100,000** retirees. This will expand our base and allow us to communicate with these retirees throughout the election cycle. Absentee Ballots are becoming more critical in every election and we will heavily promote Absentee Ballots among the senior population to increase voter turnout.
2. **Affiliate Chapter Presentations:** Alliance affiliates will make educational presentations at local retiree meetings and distribute Alliance literature throughout the election season. These presentations have the potential to reach **500,000** seniors, and provide opportunities to recruit new leadership for the fall campaign.
3. **Voter Guide:** The Alliance will produce a state specific Alliance "Voter Guide" on the rights of each voter and an explanation of the state voting system and rules as well as county-based voter information.
4. **Senior Communities:** Through its educational presentations on retirement security issues, the Alliance has been able to gain access to residents of senior centers and nursing homes across the country. Traditionally, residents at these facilities do not receive political information because most partisan activities are prohibited. The Alliance is in a unique position to reach these voters. In 2008, the Alliance projects it will reach **36,500** new seniors with the Alliance message.

Communication:

The Alliance will use many vehicles to communicate with its members as well as the media

1. **Friday Alerts and Retiree Advocate:** The national weekly email newsletter, and the state Alliance's bi-monthly newsletter include reports relating to the developments of the mid-term election. These newsletters reach over **100,000** members each month, with articles reporting on the critical issues and candidates' positions. They also encourage members to get involved in local activities, including a calendar of events around the state.
2. **Congressional Voting Record:** The National Alliance will issue its biannual voting record that is a report card for each congressional representative and how they voted on important retiree issues throughout the legislative session. Congressional Voting Records can and will be used extensively as part of our educational presentations.
3. **Persuasion Pieces:** The Alliance will develop persuasion pieces that will be mailed to members and also can be distributed through our chapter network. The persuasion will include candidate comparisons, issue specific pieces, and GOTV mail.
4. **Radio Spots:** The Alliance will create radio spots that will highlight where candidates stand on Social Security and Medicare.
5. **Earned Media:** Alliance retiree zone coordinators, staff, and consultants will regularly submit Opinion Editorials and Letter to the Editor to all local newspapers.
6. **Conference Calls:** The State Alliance leadership (with staff) will hold monthly briefing conference calls for state leadership, including Officers, Executive Board Members, and Alliance Retiree Zone Coordinators that will have regular updates from the National Alliance.
7. **Consistent Issue-Based Communications Strategy:** Throughout the year, we will choose regular issues to stay focused on so that our messaging remains consistent. We will be responsive to major current events, but more importantly, we will be responsible first and foremost to the issues that affect our membership. These issues will include: Social Security, Prescription drug prices, and in general, retirement security.

Mobilization: *One of the strengths of the Alliance is its strong grassroots network. The Alliance will continue to organize and mobilize around Social Security, Medicare and the need for a real Prescription drug benefit. Mobilization efforts will include:*

1. **Regional Alliance Zone Kick Off Meetings:** These meetings will bring together leaders and activists in their respective zones to kick off our work. These events will be both social and activist in nature, centering around some kind of action and providing an opportunity for key personalities in the zones to get to know each other.
2. **Town Hall Meetings:** Town hall meetings are a great opportunity to build our relationships and coalitions in the communities where we do our work and continue the education of our members. Through organizing around a particular issue or group of issues, we can engage our members.
3. **Candidate Forums:** Particularly with local candidates, candidate forums are a wonderful way to educate our member son the specific stance of candidates on our issues. Through focused attention on senior issues, these events raise the profile of both our issues and our members with the press as well as the candidates themselves. All such forums will be conducted according to the IRS guidelines for 501(c) (3)/(4) organizations.
4. **Direct Action Events:** Working with our state Alliance Retiree Zone Coordinators, staff, and consultants, we will develop events that will attract press coverage and highlight important issues and key implementation dates. Direct action events will also include attending, sponsoring, and/ or speaking at town halls, forums, or hearings to continue to raise the public consciousness about the difference between candidates on retirement security issues.
5. **Community Advocacy Network Events:** Each state Alliance has individual members that have signed up for \$10.00. State ARA leadership will host CAN only membership events around the state to mobilize our community partners.
6. **Endorsement Events:** Small press conference in each key district announcing the endorsed candidates of the National Alliance for Retired Americans.
7. **Literature Drops:** Each State Alliance will coordinate massive issue base literature drops to all of the affiliates and members in the Fall. Literature drops will include candidate comparisons, the Alliance Congressional Voting Record, and fact sheets on retirement security issues.

8. **GOTV Mobilization:** In the weeks and days leading up to the election, each state will host a specific GOTV campaign geared and getting senior voters to the polls and making sure their vote counts.

CONCLUSION

Retirees are without a doubt one of the most powerful groups in America, but we need to provide a strong program of education, communication, and mobilization to maximize that power. In 2008, we will harness our efforts to make a difference on behalf of all retirees and all Americans. We will do this for ourselves and, in solidarity, for all the generations that follow.