Letter from the President

As we reflect on 2016, the Alliance is proud of its strong advocacy and sobered by the challenges we face in the wake of the elections.

The lessons we learned in the fight against the TPP, in using the power of the executive branch to secure wins for older Americans in the face of a hostile Congress, will be of use to us in the coming year. We spent 2016 getting back to basics, training new grass roots organizers to grow our activist core and modernize our communications tools to reach new audiences.

Alliance members are engaged and ready to take effective action. Since November we’ve received thousands of messages from retirees who responded to our calls for advocates to speak out. Speaker Paul Ryan’s announced plans to dismantle Medicare and Medicaid and eliminate our core benefits have rallied our members like never before. We are ready to lead the effort to defeat these and any anti-retiree proposals with help from our allies in the labor movement and the public.

We are grateful for the support of our union affiliate members and our community members and are ready for the challenges we face in the coming year.

In solidarity,

Robert Roach, Jr.
Policy Advocacy

While the presidential election precluded much progress in Congress, the Alliance secured gains for retirees on key issues.

Defeating the TPP

Working in coalition with labor, environmental and public health groups, our members fought and succeeded in blocking the Trans-Pacific Partnership (TPP) trade agreement from a vote in the U.S. Congress.

Our members visited dozens of elected officials, generated thousands of calls and letters to Capitol Hill offices and published op-eds that explained how the TPP would lead to higher prescription drug prices for seniors and consumers.

Protecting Patients in Long-Term Care Facilities

We successfully fought for the Obama Administration rule providing patients who have been harmed by a long term care facility and their families the ability to file a lawsuit rather than being forced to accept arbitration. Like the Fiduciary Rule, this gain will need to be defended in the coming year.

Fiduciary Rule

Each year Americans lose $17 billion in retirement assets due to bad financial advice. The Alliance pressed the U.S. Department of Labor to issue a final Fiduciary Rule, which requires financial advisors to take the interest of their clients into account rather than their own self-interest, and blocked legislative attempts to repeal it. We will now need to defend this rule from attack and reversal by the incoming Republican administration.
Election 2016

Who is elected to Congress and the presidency is critically important to retirees.

Older Americans’ retirement security starts with their earned Social Security and Medicare benefits. Millions of American retirees also receive pension benefits, which need to be protected and preserved.

Because of our efforts, voters learned of the anti-retiree plans of several Republican presidential candidates, including Gov. John Kasich and Sen. Marco Rubio. Our efforts directly influenced the Democratic National Committee (DNC) Platform and we engaged with candidates for office at the federal, state and local level.

The Alliance educated older voters about the candidates’ positions on issues that affect them most, and worked to make sure our members turned out at the polls. We were particularly engaged in the Senate races in Florida, Nevada, North Carolina, Ohio and Wisconsin. Older voters participate in elections at a higher rate than the general public, and 2016 was no exception.

Member Engagement
Social Security and Medicare Anniversary Events

This year marked the 81st and 51st anniversaries of Social Security and Medicare and our members marked the occasions with 45 events.

These events serve to remind the general public about the support for these vital benefits and allow state and local chapters to recruit new activists.

In Mississippi, which has no state chapter, members from across the state came together to celebrate the anniversaries of Social Security and Medicare, and used the occasion to lay plans to charter a new Alliance chapter for their state.

Regional Meetings and Regional Board Elections

In 2016 more than 300 key Alliance activists attended four regional meetings in Las Vegas, Orlando, Detroit and Washington, DC. Conference attendees were briefed on senior issues, consumer fraud prevention and the BCTGM’s fight against Mondelez, the maker of Nabisco products, which moved American jobs from Chicago to Mexico. Alliance staff conducted workshops and trainings on legislative issues, grass roots organizing and how to use the online electronic voter file to track activities.

During the regional meetings, members also elected new members to the Alliance’s executive board.

Voter Education
Highlighting Social Security in the Presidential Campaign

The Alliance worked to get both Social Security expansion and measures to combat high prescription drug prices in the DNC platform. National Alliance Executive Board Member Kitty Kennedy testified before the DNC Platform Committee members and shared powerful stories of retirees who are struggling to cope with prices for common prescription drugs, including antibiotics and insulin, increasing every month.

The platform included the Alliance’s recommendations, and helped unify Democrats on Social Security expansion and the need to take strong action to rein in the price of prescription drugs.
During the presidential primaries Alliance members attended campaign events and directly confronted Republican presidential candidates Jeb Bush, Marco Rubio and John Kasich in discussions about Social Security. These activists were instrumental in bringing these candidate’s anti-retiree positions to light.

**Candidate Endorsements**

The Alliance distributed questionnaires to candidates for federal offices, and endorsed 210 candidates this year. All endorsed candidates opposed the TPP, favored Social Security expansion, committed to protect Medicare’s guaranteed health care benefits and vowed to fight to reduce prescription drug prices.

We endorsed four new members of the U.S. Senate and 12 new members of the House of Representatives in addition to 130 incumbent representatives and senators who were re-elected.

The Alliance congratulates these newly elected members of the Senate and House and looks forward to working with them in Washington and in their home states and districts.

**Senate:**
- Tammy Duckworth, D-IL
- Maggie Hassan, D-NH
- Catherine Cortez Masto, D-NV
- Chris Van Hollen, D-MD

**House of Representatives:**
- Anthony Brown (MD-4)
- Charlie Crist (FL-13)
- Pramila Jayapal (WA-7)
- Ruben Kihuen (NV-4)
- Raja Krishnamoorthi (IL-8)
- Stephanie Murphy (FL-7)
- Brad Schneider (IL-10)
- Jimmy Panetta (CA-20)
- Jamie Raskin (MD-8)
- Lisa Blunt Rochester (DE-At Large)
- Jacky Rosen (NV-3)
- Carol Shea Porter (NH-1)
Senate Battleground
Voter Education

Voter Education on Social Security

The Alliance received a grant from the For Our Future PAC to produce and run online Facebook and YouTube video ads. The ads highlighted the support of incumbent GOP Senators and Rep. Heck for Social Security privatization and asked voters to tell their senator to expand Social Security, not destroy it. The ads were viewed more than 1 million times and reached older voters in Florida, North Carolina, Missouri, Nevada and Pennsylvania.

The Alliance received a second For Our Future grant to do grass roots earned media events in targeted states publicizing the anti-Social Security records of incumbent Senators in Florida, Missouri, North Carolina, Ohio, Pennsylvania and Wisconsin as well as Rep. Heck in Nevada. The events garnered more than two dozen radio, television and newspaper articles, including more than 10 in Florida alone.

All of the events were also highlighted and promoted via Social Media, reaching additional Alliance members and the public at large.

Education and Advocacy
Tele-Town Halls

The Alliance held six Tele-Town Hall meetings during the 2016 election cycle with candidates for the U.S. Senate. These members informed, engaged and mobilized Alliance for Retired Americans members in key battleground states.

Alliance President Robert Roach and Missouri Governor Jay Nixon held a Tele-Town Hall meeting to mobile retirees in the effort to sustain the Governor’s veto of Right-to-Work legislation.

These telephone meetings continue to be a particularly effective way to engage with retirees, who join and stay on these calls longer than other voter groups.

For the election, the Alliance called 122,435 Alliance members in North Carolina, Arizona, Nevada, Florida, Missouri and Pennsylvania and connected 23,502 members. The meetings also produced nearly 100 volunteers for the Labor 2016 election programs in the respective states.

Volunteers

Hundreds of Alliance members were regular volunteers in Labor 2016 phone banks in dozens of states, making calls to fellow union retirees with a tailored message about what was at stake for retirees in the election. In many states, including Arizona, Florida, Illinois, Michigan, Nevada, North Carolina and Pennsylvania, Alliance members organized and led the phone banks helping reach thousands of voters.

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<th>STATE</th>
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Alliance for Retired Americans 2016 Direct Mail Program

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<td>New Hampshire</td>
<td>Senate</td>
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<tr>
<td><strong>Total</strong></td>
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</table>

**Voter Protection**

Alliance members also assisted with voter protection in Missouri, North Carolina, Pennsylvania and Florida. As trained voter protection volunteers, Alliance members ensured that critical voting locations were successfully opened and provided assistance to individuals having difficulty exercising their right to vote.

**Direct Mail Program**

The Alliance sent more than one quarter million pieces of direct persuasion and get out the vote mail to members in nine states. These pieces highlighted races for Governor, the Senate and President. In three states, the Alliance sent letters to members encouraging them to vote for Alliance endorsed candidates for Senate.

**Election 2016 Case Studies**

The Texas and Nevada Alliances were both successful in engaging their members to help elect their endorsed candidates.

In Texas, extensive chapter organizing prior to the election season positioned them for success in November. In Nevada, a variety of campaign tactics were used to support Alliance endorsed candidates in two key contests.

**Texas**

More than 300 Texas Alliance members were engaged in one or more political activities this cycle. Building relationships and establishing networks of retiree activists long before election season enabled the Texas Alliance for Retired Americans to play a critical role throughout the state. Texas has expanded and built strong regional chapters organized in each of the state’s six major population centers.

The Texas Alliance regional chapter in Austin organized phone banks and events for endorsed candidates Rep. Lloyd Doggett and state representative-elect Gina Hinojosa. They also engaged members to vote for endorsed, and successful, candidates for the Austin City Council.

In Corpus Christi, the Coast Bend chapter enjoyed electoral participation by nearly every active member of their organization, making significant contributions to campaigns from School Board to the Presidential level.

The Dallas chapter hosted regular phone banks and used a virtual dialer to contact members in support of a slate of endorsed state candidates, including a successful State House challenger.

In Houston, Alliance members organized nine Saturday canvasses to promote endorsed candidates and worked at the polls on election day to ensure smooth voting operation.

The Golden Triangle Retirees in Florida...
Beaumont played important roles as voter registrars, canvassers, phone bank captains, drivers to the polls, candidate forums and rallies — including the Pews to the Polls Sunday Get Out the Vote effort on the penultimate Sunday before election day.

In Fort Worth, Alliance members were regular canvassers and phone bank captains, working with allies such as the Texas State Employees Union to help get out the vote for endorsed state candidates.

Results
Nevada

The Nevada Alliance was a highly visible presence throughout the 2016 election cycle and our efforts were rewarded with the election of Catherine Cortez Masto over Sen. Joe Heck, a die-hard supporter of privatizing and cutting Social Security and Medicare.

Tele-Town Hall

On Thursday, October 27th, the Alliance hosted candidate Catherine Cortez Masto for a Tele-Town Hall meeting. The members were invited to the call based on their propensity to vote as well as their Democratic support score. Hundreds of Alliance members joined the conversation with candidate Masto who took questions from members from around Nevada.

Earned Media Events

The Alliance organized a number of events designed to attract media attention to the necessity to protect Social Security. These included news conferences, interviews with journalists, letters to the editor and visibility efforts to bring attention to Heck’s poor record on Social Security. A 3-minute television news story was broadcast about the Reno event.

Direct Mail

The Alliance sent direct first class mail to hundreds of members who were identified as being likely to vote but who were among the most persuadable Nevadans. This letter stressed the importance of voting for Hillary Clinton and Catherine Cortez Masto because of their strong commitment to seniors and the issues we champion. This direct and personal appeal contributed to the success of our program in Nevada.
Member Run Phone Banks

Nevada Alliance Vice Presidents Rich Miller and Dick Collins organized and ran Alliance member and Labor2016 phone banks that operated daily, identifying and turning out supporters of Hillary Clinton, Catherine Cortez Masto and Ruben Kihuen. This organized and sustained effort played a critical role in turning out Alliance members to vote for our endorsed candidates in Nevada.

Visit by Alliance President Robert Roach

In October, Alliance for Retired Americans President Robert Roach visited campaign operations in Las Vegas, Nevada during a trip to attend the second Presidential Debate. During his visit, President Roach joined with Nevada Alliance activists for a pre-rally breakfast before joining hundreds of Union and Alliance members to protest Donald Trump’s hotel on the Las Vegas strip.
Awareness to Activism

In 2016, the Alliance significantly increased the number of people it reaches with information and alerts about retiree issues.

**www.retiredamericans.org**

The Alliance launched a new national website in December 2015 and added 14 state Alliance chapter websites in 2016. The website is a source for timely information about issues facing retirees and as a place where activists can get involved online. Our blog features our take on key issues and opportunities for advocacy and these posts generate a quarter of all our website visits.

Since the launch, more than 80,000 unique visitors have been to our website, a 2,000% increase over 2015.

**Friday Alert Newsletter**

*Our Friday Alert newsletter readership remains high with 38% of people who receive it opening the message each week (this is three times the industry average for newsletters). It is our primary means of educating members on issues and opportunities to get involved in their communities.*

**Social Media**

The Alliance is reaching new audiences and allies through Facebook and Twitter. Our social media audience is keenly interested in policy developments that may affect their Medicare or Social Security benefits, as well as on campaigns to protect workers — such as the Mexican-made Oreo cookie boycott, the efforts by Trump hotel and casino workers to negotiate a fair contract and to defeat the TPP.

Hillary Clinton recorded a special video for Alliance members discussing Social Security expansion and other retiree issues. It was the most viewed message the Alliance disseminated in 2016 with more than 200,000 views. It was introduced to our online activist network via an email from AFL-CIO Secretary Treasurer and Alliance Executive Vice President Liz Shuler and reached more than 100,000 people on Facebook.
Retiree Activists at Work

Alliance retirees lent their voices and took direct action in support of labor movement allies across the country.

President Robert Roach Jr. joined UNITE workers from the Trump Taj Mahal casino on the picket line in Atlantic City to urge owner Carl Icahn to negotiate a fair contract. He and members of the Nevada Alliance joined thousands of activists at the “wall of taco trucks” rally outside the Trump Hotel in Las Vegas in support of the members of the Culinary Workers Union who have been unable to get the hotel to the negotiating table.

Alliance members sent petitions and supported picket lines outside Verizon retail stores during the CWA and IBEW strike against Verizon that saved thousands of positions from being outsourced. The Alliance has built support for the BCTGM-led boycott of Mexican-made Oreo cookies. The boycott began after Mondelez moved hundreds of jobs from Chicago to Mexico. Pennsylvania Alliance members have joined actions with BCTGM workers against Just Born, the maker of Peeps candy in their dispute over wages, health care and pension benefits.

The Alliance promoted the APWU-led Grand Alliance to Save Our Public Postal Service campaign and postal banking initiative with our members through blast emails and our blog. Alliance staff and members also participated in AFSCME’s member engagement phone bank effort to increase solidarity.
Visit us at www.retiredamericans.org.