

## DEVELOPING AN ACTION PLAN

---

The retirement security of NEA pre K-12 members and their families is threatened by a few extremists who oppose most public services and corporate interests who stand to benefit. They are advocating and lobbying for a shift from DB plans to some form of DC plan. We must act now to preserve DB plans for America's teachers and ESPs.

As a first step, consider developing and implementing an ongoing educational campaign. The campaign should target a broad range of groups.

- Endeavor to increase awareness and appreciation of younger teachers and ESPs about the benefits of DB plans. Because they are years from retirement, they may not fully understand how DB and DC plans differ.
- Provide members the information they need to be well informed about retirement income needs.
- Educate employers about the comprehensive nature of DB plans. They provide not only retirement income, but also benefits that assist employers in managing the workforce, such as early retirement and disability benefits.
- Work with your retirement system and help the administrators and trustees make arguments about why DB plans should remain the primary retirement benefit for teachers and ESPs.
- Urge pension boards to commit to DB plans and advance activities that would reduce the threat of any challenge should it come.
- Question investment managers. If the investment managers for your DB plan are lobbying for DC plans in other states, hold them accountable for their actions.
- Periodically provide information to state legislators about how DB plans help promote a high-performance workforce. This is particularly critical in states whose legislators are term-limited. Send newly released research and significant news; lobby for DB plan protections and improvements; and point out the shortcomings of DC plans.
- Build coalitions with other employee associations and retiree groups. Coalitions ensure that all affected groups speak with one clear, united voice.

Also, have a defensive plan ready if a DC conversion begins in your state. We recommend developing a strategy that includes:

- ▶ Understand the other side’s arguments in order to be able to counter them effectively;
- ▶ Assess the DB plan’s weaknesses and strengths;
- ▶ Evaluate the options;
- ▶ Identify the players;
- ▶ Mobilize and activate union members and retirees;
- ▶ Gather background information and prepare fact sheets and other materials supporting the Association’s position;
- ▶ Educate and lobby legislators and public decision-makers:
  - Is the official for or against the Association’s position?
  - Can he/she be persuaded to support the Association’s position?
  - Did the Association endorse the legislator?
  - Who are the most influential people in the legislative body?  
Where do they stand and whom can they influence?
  - Do any Association members know them personally?
  - Have any Association members worked on their campaigns?
  - When are they up for re-election? Do they have any opposition?  
How long have they been in office?
  - Who are the voters in their districts?  
Which groups of voters do they depend upon for election?
  - How many Association members live in their districts?
  - Who is their staff?
- ▶ Coordinate with NEA to gather information on other activities around the country.

To show state and local officials that a substantial number of their constituents support the Association’s position, the Association can organize:

1. Letter-writing campaigns;
2. Postcard campaigns;
3. Petitions of support for the DB plan;
4. Turnout at hearings and other events;
5. Media coverage – direct contact with reporters, letters to the editor, op-ed pieces, press statements, calls in to radio talk shows, etc. about the value of defined benefit plans as the foundation of a secure retirement program;
6. Letters of support from prominent people/organizations;
7. Discussions at public meetings or forums;
8. Expert testimony at committee hearings or meetings;
9. Make contact with elected officials by telephone; and,
10. One-on-one meetings with elected officials at their offices or public events.

For additional information and referrals, contact Collective Bargaining and Member Advocacy.

Collective Bargaining & Member Advocacy  
 1201 16th Street, N.W.  
 Washington, DC 20036  
 (202) 822-7080  
 fax (202) 822-7833  
 or email [nmckenzie@nea.org](mailto:nmckenzie@nea.org)