

THE NATIONAL RETIREE LEGISLATIVE NETWORK (NRLN)

The Role of and Support for NRLN CHAPTERS

The Operating Model – January 16, 2014

About The NRLN

Based in Washington, D.C., the National Retiree Legislative Network (NRLN) is the only nationwide organization solely dedicated to representing the interests of retirees and future retirees. Formed in 2002, the NRLN's endeavors to secure federal legislation to protect retirees' employer-sponsored pensions and benefits in addition to keeping Social Security and Medicare strong. The NRLN is a non-profit, non-partisan, grassroots coalition representing more than 2 million retirees who came to the NRLN from 23 retiree associations and as individual members who have retired from 168 different U.S. corporations and public entities. NRLN members live in all 50 states and in all 435 Congressional Districts. Over 66% of the Congressional districts have built a formal leadership structure.

The NRLN Mission and Structure

The mission of the National Retiree Legislative Network is to develop, identify and rally support for federal legislation that guarantees fair and equitable treatment of retirees and future retirees. We work to protect earned employer-sponsored pensions and benefit plans and Medicare and Social Security that Americans worked many years to earn and expected to be available throughout their retirement. It is important that we protect the real income and economic security of retirees. We will oppose legislation and regulations that will do harm to the quality of retirement life.

As a non-partisan coalition of retiree associations and individual from across America we utilize the strength of our Board of Directors, Washington, DC staff, Regional Vice Presidents, Retiree Associations, State Chapters, and individuals in our Grassroots Network in all 50 states to represent and lobby for the interests of the millions of men and women who retired from the private and public sectors. The NRLN collaborates with and serves on various levels with national advocate organizations headquartered in Washington D.C. and elsewhere.

The NRLN Focus, Practices and Sources of Income

We focus on protection and enhancement of income security and health care reduction issues only for Retirees. The NRLN proactively lobbies a Legislative Agenda that is built from the bottom up by members; we pride ourselves on preparation, diligence and professional representation.

The NRLN is a 501C (4) non-profit that does not campaign for candidates or political parties nor do we make campaign contributions, buy meals or drinks or otherwise try to influence elected officials or those running for office by offering personal gains.

Our sources of income are dues from member associations, their members' contributions and individual contributions from At-Large Chapter's members and other individuals.

For a detailed view of our organization, Legislative Agenda, White Papers about our Top Priorities and more about us go to www.nrln.org

NRLN Chapters

In order to reach more individual members that can help us better understand retiree issues and thus help us define our agenda on an ongoing basis and in order to expand our local grassroots support networks, we are introducing Chapter organizations.

NRLN Chapters will be labeled “NRLN (xxx) Chapter” and be part of NRLN Grassroots Organization and will be governed by teams comprised of a President and Directors of Legislative Affairs, Recruitment and Communications. Chapter Boards are not required and one or more of the Chapter leaders may assume one or more of the leadership positions as situations dictate. We are encouraging a wide diversity of grassroots advocates from companies and other entities that may or may not have formal retiree organizations.

Chapters whose advocates are retired from companies where there is an existing NRLN Retiree Association that has established a working relationship with company officials, shall defer to the already existing NRLN Company Retiree Association with regard to company relations and meetings.

NRLN Bylaws, Chapter Model and Modifications Approved by the NRLN Board

The NRLN board approved changes to the NRLN Bylaws in 2012 that established Chapters as integral to the NRLN’s 501C (4) organization. Therefore Chapters are to operate under the Bylaws and the Chapter Operating Model that was also approved in 2012 (as modified with board approval), as NRLN grassroots advocate organizations.

The board approved establishment of Chapters to manage NRLN grassroots operations in the states of AK, AZ, ID, MT, NM, NV, OR, UT and WA and in the Villages, FL.

The board approved modifications of the Chapter model in May of 2013 to include specific rules regarding the solicitation of contributions and then in September 2013 to stipulate that Chapters could recruit NRLN association’s members as grassroots CD leaders. All NRLN Action Network members are Grassroots advocates.

This model will be the template and policy guide for development of proposed new Chapters and all new Chapter proposals must be approved by the NRLN board.

Chapter Grassroots Advocate Recruitment and Solicitation

Grassroots Advocate Recruitment: Chapters may use their website, emails, phone calls, newsletter inserts etc. to recruit Chapter Grassroots advocates. All current NRLN Association members will be considered advocates. There are no restrictions as to others who may be recruited to be a grassroots advocate and NRLN Action Network lists will be provided to aid in these recruitments.

When a Chapter learns that a grassroots advocate recruited to lobby under the leadership of a Chapter is a current or past member of an NRLN association or has retired from a company

associated with an NRLN Association, they shall forward advocate data to the NRLN VP Communications who will validate the relationship and forward the advocates information to the appropriate association and then upload the data to the NRLN Action Network. Selected CD and State leaders names will be reported to the VP Grassroots.

In all other cases, names of grassroots advocates recruited to lobby under the leadership of a Chapter shall be forwarded to VP Communications who will upload the advocate data into the NRLN Action Network database. He will review advocate data, upload it and, if necessary, forward names to appropriate associations. Selected CD and State leaders names will be reported to the VP Grassroots.

Grassroots Advocate Individual Contributions Solicitation: Chapters may use emails, phone calls, newsletter inserts or direct contact to solicit contributions but must exclude anyone who's NRLN Action Network record is coded to note that the individual is a member of an NRLN association or a retiree from a company whose retirees could belong to an NRLN current Association. All Chapter solicitation lists will be prepared by the VP Commutations who will exclude such association affiliated individuals.

Chapter Leadership Teams will manage the efforts of all NRLN grassroots advocates engaged in NRLN grassroots activities in their approved territories, and when engaged in Grassroots activities will be referred to as NRLN Grassroots XXX (State or Geographic Area). Chapters will recruit volunteers to serve on teams that will lobby the NRLN agenda in States and Congressional Districts (CDs) and will receive support from their Regional VPs and the NRLN VPs of Grassroots, Communications and Legislative Affairs and Chapters will collaborate with but not raid other NRLN Chapter or Association members. Any Grassroots advocate can serve in any capacity of the Grassroots team.

NRLN Grassroots Leaders and Advocates Shall be Titled Using the following Template:

Template – (name), (Title), NRLN Grassroots Organization-Southwest Region-(Geographic Area)

Examples:

(Name) Regional VP-(State), NRLN Grassroots Organization, Desert Southwest Region

(Name) (State)State Leader, NRLN Grassroots Organization, Desert Southwest Region OR

(Name) (State) Chapter President, NRLN Grassroots Organization, Desert Southwest Region.

(Name) Congressional District Leader – AZ02, NRLN Grassroots Organization, Desert Southwest Region

(Name), Grassroots Advocate, NRLN Grassroots Organization - Desert Southwest Region

New NRLN Chapter States or Chapters proposed to be responsible for grassroots advocacy territories (one or more CDs) within states must be approved in advance by the NRLN board.

Grassroots Advocacy Activities

Where NRLN Chapters are formed in communities that require that community rules be followed, our Chapters are obligated to abide by such rules. Specifically, in such communities, our NRLN Chapters will conduct advocate recruitment, business meetings and other activities in compliance with local rules. The NRLN reserves the right to rescind its affiliation with a Chapter that does not comply.

Chapter Focus – The NRLN Legislative Agenda Top Priorities Income Security

Protect Social Security earned and paid for benefits
Protect Pension plan assets from misuse by U.S. and foreign corporations
Protect Pension Plans from corporate mergers & acquisitions, including foreign control
Protect Pension Plans from terminations
Pension Derisking and Annual Funding Disclosure protections and improvements
Bankruptcy Reform and PBGC takeover rules

See NRLN whitepapers for each of the above topics. Also see tax and other agenda issues.

Health Care Security

Protect Medicare Benefits
Maintenance of Cost Protection to protect establish health care benefits
Medigap- apply same rules as are applied to Medicare Advantage and ACA policies
Protect against rising cost of prescription drugs
See NRLN whitepapers for each of the above topics – also see other agenda issues that protect against health care service and product cost inflation increases that erode retiree income security.

Chapter Contributions, Expenses and Operational Particulars

All mail and email member contact information and the NRLN Treasurers database will be maintained on NRLN secured servers and access to or use of such data by third parties is prohibited.

Initially, Chapters are required to upload their member mailing lists to NRLN Capwiz, Mail Server and Treasurer's databases; mailing address including 9-digit Zip Code, phone number and email addresses of all members.

New Chapter individual advocate applicants will use NRLN Individual Contribution forms coded for specific Chapters. Contributions will be sent directly to the NRLN's Post Office box and the NRLN Treasurer will maintain Individual and Chapter revenue subaccounts.

NRLN Chapters are not required to file as state entities nor should they be required to obtain EIN numbers from the IRS or have to file tax returns, The NRLN Treasurer will account for revenue and expenses and file the required NRLN reports.

NRLN's board of directors is provided copies of NRLN Income and Balance Sheet Statements monthly, annual tax filings and copies of the NRLN registered lobbyist's quarterly filings.

Regional Chapter VPs may receive contribution reports and other data upon request. Chapter individual contributions data will not be shared with other Chapters or Associations.

Chapter budgets will be agreed upon in advance with the NRLN President. Expense reimbursement requests shall be then processed by standard voucher form to the Regional Chapter VP who must approve expenditures and then forward voucher to NRLN President for final approval. The NRLN President then forwards the voucher to the NRLN Treasurer for payment.

NRLN Services Provided To NRLN Chapters

Formation Assistance Team – NRLN President, NRLN Treasurer, Regional VP, VP Communications and VP Grassroots.

Ongoing Grassroots Assistance - training and materials; day to day collaboration and sharing of member contacts; setting of agenda priorities and other special assistance, as needed.

Mail, Email, Website, Phone Service and Financial Service Provided to Chapters by the NRLN:

Each Chapter situation will be reviewed on a case by case basis to determine the appropriate level of support services, listed below, that may be provided by the NRLN:

NRLN Quarterly Newsletters - Chapter members will receive the NRLN Quarterly Newsletter, *FOCUS*, which will contain Chapter inserts (one-page double sided) that will include Chapter president messages and news. Chapter Communications Directors will coordinate input with NRLN VP Communications.

NRLN annual solicitation - will be sent in February and a postcard reminder will be mailed in August. NRLN Chapter solicitation letters will be mailed, at agreed upon dates.

Grassroots lobby messages and Action Alerts - will be sent by the NRLN VP Communication using the NRLN Action Network. Messages must be in support of the NRLN's Legislative agenda. Any NRLN individual member on the NRLN Action Network database may "Opt Out" at any time!

Phone conference calls – since most chapter business can be conducted without extra charges using member’s personal phones, conference service may not be necessary. When necessary, conference calls can be made using NRLN’s service provider.

Electronic Messaging - The NRLN assigns association and chapter codes to names on NRLN databases so that Association or Chapter leaders may develop messages in collaboration with the NRLN VP Communications who sends them over the NRLN Action Network.

The NRLN website will display a “Chapters” tab and sub-tabs that Chapter members can access to see how to contact NRLN and Chapter leaders. Chapter Communications Directors may work with NRLN Communication’s VP.

Accounting and Financial Service - collect contributions, maintain Chapter sub accounts and pay approved Chapter expenses.

Other Collaborative Support – Offer and coordinate communications and other support for collective activities among and between NRLN Chapters and Associations.