



# **The Pension Advocacy Network**

An Educational Initiative of the  
Florida Public Pension Trustee Association

## **Our Vision**

Effective communication – a grassroots network designed to preserve retirement security for Florida public employees, retirees, and their families.

## **Our Mission**

To educate federal, state and local elected officials regarding the importance of preserving guaranteed pension benefits for public workers, their plan sponsors, and for the Florida economy. We will fulfill this mission by creating and maintaining a statewide communication program that delivers accurate, timely, and reliable facts to decision-makers.

## Core Values

- **Quality** – Committed to sharing relevant, dependable, and actionable information with public officials and plan allies. Seek to become a *‘go to’* source for accurate information.
- **Integrity** – Act in an ethical and professional manner building a reputation for honesty and fact-based communication. Seek to be a *‘trusted’* source.
- **Openness** – Recognize that effective communication requires a willingness to listen to and share information with others. Seek to build a network that is *‘responsive and respectful’* to questions, concerns, and alternate views.
- **Accountability** – Take ownership and responsibility for the information we deliver. Seek to be viewed as a respected pension industry leader – even by those who don’t always share our vision.

# Our Agenda

- Defining and communicating the threat
- Building an effective communication network
- Building relationships... “Become the ‘Go To’ source for reliable and actionable information

# Defining and communicating the threat

- The national 'Anti-DB' agenda
- The threat from Tallahassee – recent legislative initiatives
- Anti-DB advocates and think tanks
- Becoming 'Pro-Active' vs. 'Reactive' to threats

## Building an effective communication network

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FPPTA®

The Pension  
Advocacy  
Network

FPPTA

- Trustee Education
- Research & Data
- Communications
- Elected Officials/Staff

Strategic  
Allies

- Statewide Organizations
- Information Sharing
- Go To... Trusted Source

Elected  
Officials

- **SHARING THE FACTS**
- A Targeted Grassroots Network



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# PENSION ADVOCACY NETWORK – FPPTA

## 1. Trustee Education

## 2. Research and Data

- a) Public Pension Institute ⇒ The FPPTA Toolbox
- b) FPPTA Pension Plan Data Center

## 3. Communications

- a) Social Media ⇒ Connect with Us
- b) Press Relations

## 4. Elected Officials/Staff

- a) Sample Plan Summary
- b) Legislative Guide to Florida Public Pensions
- c) Legislative Bulletin



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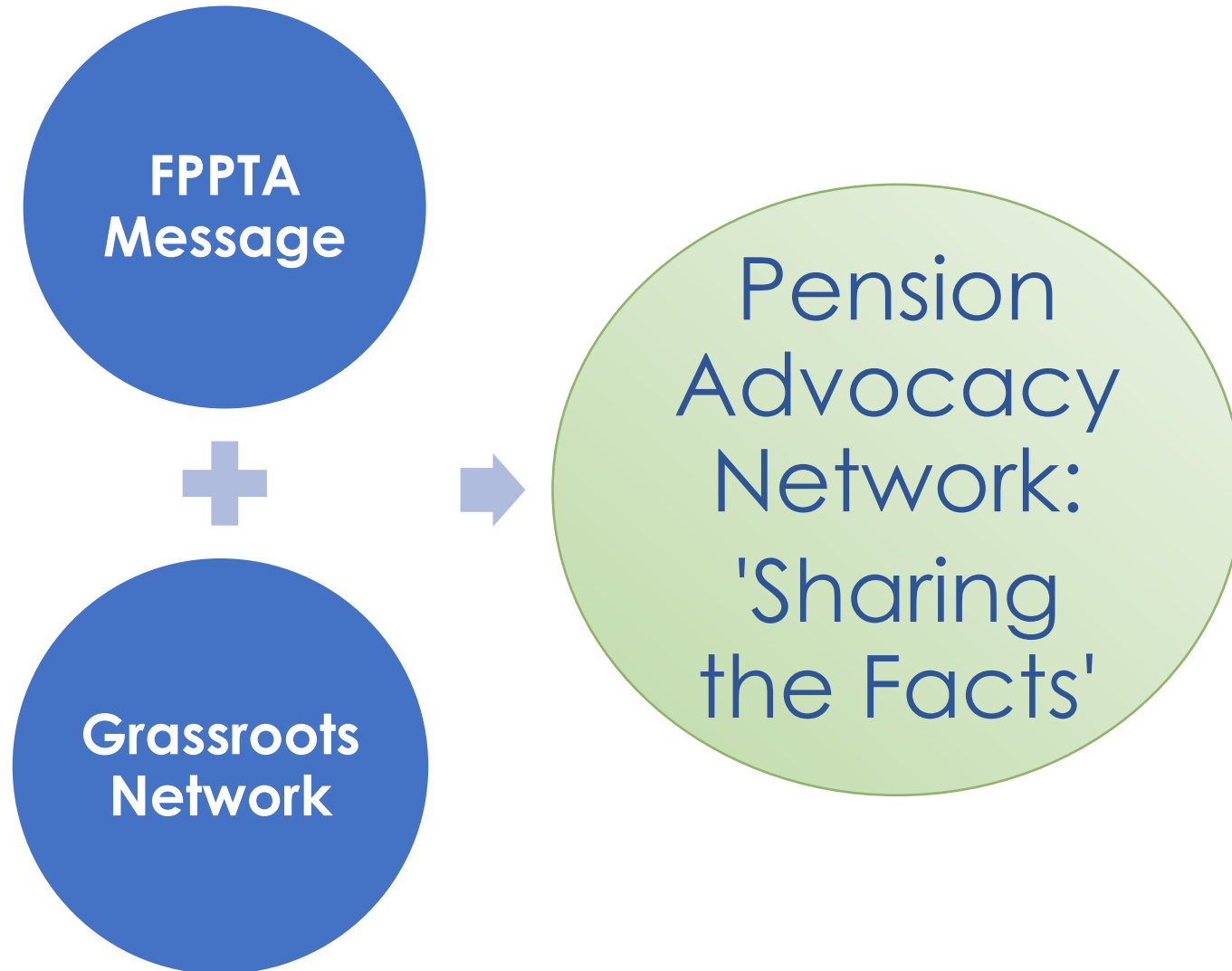
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# Building relationships... “Become the ‘Go To’ source for reliable and actionable information”



## SHARING THE FACTS – Strategic Goals

1. Identify a **point of contact** at every FPPTA pension plan to receive and share information provided by the FPPTA's *Sharing the Facts* initiative.
2. Implement an ongoing **education and communication** program to ensure each point of contact is prepared to be an effective voice for the *Sharing the Facts* initiative.
3. Define a **disciplined message** development process – including a rapid response model – to provide content for the *Sharing the Facts* initiative.

# THE PENSION ADVOCACY NETWORK: SHARING THE FACTS



# SHARING THE FACTS



- Identify Threat/Opportunity
- Develop Message/Supporting Data
- Educate Grassroots Contacts
- Communicate with Allies
- Communicate with Elected Officials/Staff

Grassroots Contact

- Build relationship with targeted Officials
- Absorb FPPTA Messages
- Share information with elected Officials
- Schedule Personal Meetings

Elected Officials

- Listen to the reaction and new information
- Communicate information to FPPTA

## THE Role OF THE GRASSROOTS CONTACT

1. Establish a relationship with his/her elected representative(s)...  
Make a friend, if possible.
  2. Facilitate the delivery of FPPTA information to the targeted elected official(s)
  3. Periodically (at least annually), meet with the elected official(s) to share information and to listen to his/her interests/reaction
  4. Provide feedback to the FPPTA
- This entire task should be accomplished 'in your neighborhood.'



# Implementing 'SHARING THE FACTS'

1. How do I volunteer?
2. Will I be given any training for this task?
3. How will I receive 'the Message' for the FPPTA?
4. Can I work with other local contacts to coordinate my outreach?
5. Will the FPPTA be there for me if I have questions?
6. When do we start?

Join us tomorrow...  
Questions, comments, and  
suggestions!

Tuesday in Classroom C at 10.40AM.