

## Retiree Meeting Requests Process

The following recommendations are aimed to handle incoming requests for Trust and/or Carrier presence at UAW retiree meetings. These are intended to provide for efficient organization of resources, recognition of priorities, and assist member understanding.

### Meeting Requests and Information Needs

- All requests for Trust and/or Carrier presence at retiree meetings shall be submitted to the Trust using the attached form.
  - This will help the Trust work with the UAW and the carriers to enhance communication efforts by maintaining consistency of information flow and avoiding duplication of efforts.
- There is no change to internal UAW approval processes as a result of adoption of this standardized request form. All participants should continue to adhere to existing internal UAW approval and notification processes in accordance with current practice.
  - The only change is that requests for Trust and/or carrier presence at retiree meetings shall now be directed to the Trust (using the attached form) rather than to the carrier directly.
  - Union Benefit Representatives, Regional Retiree Representatives, International Area Council (IAC's), and other UAW staff who are involved with retiree groups serviced by the Trust are encouraged to communicate with Colleen Allen at the Trust regarding any communication or information issues that they believe could be addressed more effectively. [coallen@rhac.com](mailto:coallen@rhac.com) or (313) 324-5915
- The Trust will work closely with the UAW Retired Workers Department and other UAW offices to make sure that communication needs are being addressed on a cost-effective basis, including attendance at meetings.
  - As part of that process, the Trust will identify situations where meetings can be combined, or where carrier presence is being requested too frequently, and will communicate those concerns to the requesting parties or other appropriate UAW officials in order to make sure that the Trust meets legitimate communication needs without excessive cost or duplication of efforts.
- The Trust has instructed their Carriers that any direct requests for carrier attendance at meetings should be re-directed to the Trust, using the attached form.

### **Standard Request Form and Process**

- Submissions to the Trust will use a Trust-designed form to capture all pertinent information (see attached)
- Standard form for completion will be faxed or emailed to the Trust by the Local, Retiree Chair, UBR or other UAW designated individual.
  - Submissions shall not be sent in by the Carrier on behalf of the UAW.
- All requests should be made well in advance. Meeting requests submitted less than 30 days prior to the meeting will need to be approved by the Executive Director of the Trust.
- Master schedule kept by the Trust will list all meetings and carrier presence for approved meetings to date. Schedule will be emailed to Carriers weekly.
- Trust will respond to requests as soon as practicable, but always within (5) business days
  - Attendance decisions will be based on several factors including but not limited to: retiree population size, current needs, geographical location, retiree concerns, potential meeting conflicts, alternate methods to satisfy need for information (Trained UBR, Benefit Coordinator, or UAW Retired Workers Department Representative could handle basic dissemination of information using DVD or scripted version of DVD presentation) etc.
  - Director of Carrier Management and Strategy will approve or deny requests
- For approved requests, meeting logistics, agenda, and A/V confirmation will be coordinated by the Trust with parties requesting the meeting.

### **UAW Requirements**

- Leverage Trust, as well as local / regional Carrier resources to resolve issues.
- Notify the Trust in advance of any local meeting requests using the standard request form and process. Carrier participation at Regional and IAC meeting requests must also be approved by the Trust.
  - In addition, please complete the Retiree Meeting Feedback Form to capture reoccurring themes in retiree questions and concerns and return it to Colleen Allen so the Trust can address future needs with the Carriers.  
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