

## **Recap of activities of PERB legislative committee and MPERA staff prior to and during the 2011 Montana legislature.**

### **I. Monitored SAVA Meetings**

The State Administration and Veterans' Affairs interim committee (SAVA) met seven times in 2010—March 3, March 19, April 22-23, May 19, June 24-25, August 17, and September 13. SAVA also met 4 times in 2009.

Staff and legislative committee members monitored their meetings; provided information/testimony on proposals under consideration; worked with our actuary who provided an analysis of various proposals to balance analysis of SAVA's actuary; worked with SAVA staff; and brought our own six proposed plans before SAVA.

The Legislative committee met at least four times before/after SAVA meetings—Aug. 19, twice in September and Nov. 22.

### **II. Staff and PERB met with other stakeholders in 2010 and considered their proposals; PERB made decisions to support, oppose, or remain neutral.**

### **III. Legislative Committee began regular weekly conference calls on Dec. 14, 2010 which continued until May 3, 2011—a total of twenty meetings in all. Staff updated committee on legislative developments; committee took positions on pending bills to guide staff. Other board members frequently participated in the calls.**

### **IV. Materials produced**

#### **A. Retirement Bills Legislative History and Table**

#### **B. Handouts for Legislators**

1. Public pension benefits as per county income in Montana
2. Message Triangle and Quick Facts
3. Newsletter for Legislators on MPERA proposals
4. Talking points for sponsors of MPERA bills
5. Other handouts at committee hearings

#### **C. PR Campaign**

1. Hired consultant
2. Newsletter outlining MPERA's bills to members, retirees and employers
3. Press Releases--#?
4. Blog
5. Social Media—Facebook

- 6. Article in Main Street Montana
- 7. Press articles published--#?
- D. White paper on Contract Rights for Board, later released

V. Legislative Efforts

- A. Hired Lobbyist consultant
- B. Drafted bills
- C. Found sponsors, briefed and provided background materials and talking points
- D. Prepared Fiscal Notes to accompany our bills and on request of MT budget director
- E. Staff met with GOP and DEM leadership in both Houses. Leg. Committee chair and former PERB president met with DEM House leader with phone follow-up
- F. Present at briefing sessions on retirement systems—new and returning legislators
- G. Testimonies at committee hearings on MPERA bills and others (includes 2 Board members)
- H. Follow-up letters on requests for information
- I. Met with sponsors of other legislative proposals such as “Utah Hybrid” proposal under consideration
- J. Met with other lobbyists to deflect opposition to our bills e.g., counties
- K. Altogether tracked 68 introduced bills and 22 un-introduced bills

VI. Results

Of MPERA’s six bills, one died in the legislature, two passed without amendment and three passed with amendments:

- A. Working Retirees Bill died in committee
- B. General Revisions and Volunteer Firefighters Compensation Act Revision Bills passed without amendment
- C. The PERS, SRS, GWPORS funding bills passed but with amendments removing the means for addressing funding shortfalls.

Dianna Porter  
PERB Legislative Committee Chair  
2010-2011  
May 14, 2011