



California Retired Teachers Association

Government Relations Committee Agenda

March 17 & 19, 2014

Chair: Irene Wetzel

Vice Chair: Violet Huprich

Advocate: David Walrath

President: Bill Kipp

March 17, 2014, Monday: 1:00 p.m. to 5:00 p.m.

Call to Order, Welcome and Introductions.....	1:00-1:05.....	Irene
Minutes: September 5, 2013: Amend and Approve	1:05-1:10	Irene, ACTION
Agenda: Amend and Approve.....	1:10-1:15	Irene, ACTION
1. Reports from Liaisons		Irene
CalSTRS.....	1:15-1:20	Pat Geyer
Senior Coalition	1:20-1:25	Paula Weiss
2. Friends of CalRTA.....	1:25-1:40	Irene, Vi, Committee
3. PROPOSAL: Division Honor Roll Recognition	1:40-1:50	Irene
4. Legislative Priority Survey Status (Demonstration).....	1:50-2:05	Irene
5. Planning Support for Divisions and Areas.....	2:05-2:15	Irene
6. Committee Activity Cycles	2:15-2:25	Irene
7. Handbook Planning.....	2:25-2:35	Irene, Vi
8. Conference Session Planning	2:35-2:45	Irene
9. Division & Area Successes - End of Year Reports	2:45-2:55	Irene
10. Committee Members Expenses	2:55-2:50	Irene
BREAK	2:50-3:10	
11. Advocacy Day Overview.....	3:10-3:45	Irene, David
-State Assembly and State Senate District Coordination		
-Briefings, Packet Materials		
12. CalSTRS Sustainability Issues.....	3:45-4:15.....	David
-SCR 105		
-GASB		
-Legislation		
12a). Other CalSTRS Issues.....	4:15-4:30.....	David
-Creditable Compensation		
-Pension Litigation (Federal/ State)		
-Pension Cut Proposition		
12b). Other Pension Issues	4:30-4:45.....	David
-CalPERSLTC		
-Supreme Court		
12c). Possible November Propositions.....	4:45-4:55.....	David
12d). Elk Hills	4:55-5:00.....	David

March 19, 2014, Wednesday: 8:00 a.m. to 12:00 a.m.

13. Reconvene and Welcome	8:00-8:02	Irene
14. Advocacy Day Input and Evaluations (Internet meeting).....	8:02-8:05	Irene, David, Guests
15. Bill Position Overview	8:05-8:10	Irene
16. Legislative State Bill Status and Position Recommendations ...	8:10-9:40	David
17. Adjourn to joint Senate & Assembly: CalSTRS Sustainability ...	10:00-12:00	State Capitol Room 444

NEXT MEETING: May 15-18, 2014 CONVENTION, Redwood City - Friday PM & Sunday AM

WE WELCOME VISITORS
CalRTA Government Relations Committee Meeting

Thank you for joining us today. A modified packet is attached. Committee chair packets are sizeable and expensive to reproduce, also hard on the tree population. As we are unable to predict the guest attendance, the guest packet is an attempt to encourage greater participation in legislation activities.

Our committee has limited time for committee input and discussions. Often our committee needs to meet during teleconferencing and frequent email discussions. Our face-to-face meeting time is very valuable. Your input is also valuable. Hopefully there will be time at the end of the meeting for your comments. If you have a comment during our discussions, let your area chair know with a note, and then the chair may recognize you for input, if time permits. Your input is appreciated. **If time does not allow for your input, please comment on the space below.**

Members are the essential component for all that we do. It is committee responsibility to provide division support and information for year round CalRTA Advocacy. Work closely with your Area Chair to provide input for CalRTA Advocacy. Here are ways to keep informed about CalRTA Advocacy activity. [Use the following website source by using ">" as steps to locate information.]

For Legislation Updates from David Walrath, CalRTA Advocate
<http://calrta.org/> > Login FOR MEMBERS > MY CALRTA (left menu) > Check Legislative Alerts

For CalSTRS WATCH
<http://calrta.org/> > Login FOR MEMBERS > MY CALRTA (left menu) > Check CalSTRS Watch

For CalSTRS Meeting Reports by Pat Geyer, our volunteer liaison to CalSTRS
<http://calrta.org/> > Login FOR MEMBERS > DOWNLOADS

For Legislation Committee Information
<http://calrta.org/> > Login FOR MEMBERS > COMMITTEES (left menu) > Scroll down to Legislation

For Legislation Hot Line Information
<http://calrta.org/> > Login FOR MEMBERS > LEGISLATIVE HOTLINE (left menu) > "Click here"

We are a grass roots association, contact your division chair, area chair, and state chair – Directory
<http://calrta.org/> > Login FOR MEMBERS > MEMBERSHIP DIRECOTRY (left menu) > Scroll to choice

To Join the Legislation Information Email Distribution list >
<http://groups.google.com/group/calrta-leg-info> > Apply for membership
or Email > CalRTA.Gov.Relations@gmail.com and request to be in Government Relations Information Group

If you were unable to give input during the meeting, please contact one of us after the meeting, and/or hand us your written question. You are welcome to contact Irene Wetzel by email: irene.wetzel@att.net

Name _____ Division _____ Email _____ Phone _____

(Use back of paper for additional space.)

“As volunteers, TEAMWORK & ADVOCACY create success!”

CalRTA State Legislation Committee

Roster 2013-2014, *Revised March 2014*

Irene Wetzel State Chair	1682 El Cerrito Court San Luis Obispo, CA 93401	H 805.543.2145 C 805.602.1355	irene.wetzel@att.net
David Walrath Advocate	Murdoch, Walrath & Holmes 1130 K Street, Suite 210 Sacramento, CA 95814	Voice: 916.441.3300 Fax: 916.441.3893	dwalrath@m-w-h.com
Lloyd Gillespie Area 1 Chair	8663 Country Creek Drive, Orangevale, CA 95662	H 916.735.5495 C 707.245.4630	lgillesp@pacific.net
Don Goodykoontz Area 2 Chair	9375 Thatcher Mill Road Shingletown, CA 96088	H 530.474.1655 C 530.339.6657	goodykoontz2@frontiernet.net
Helen Holt Area 3 Co-Chair	8600 West Lane #163 Stockton, CA 95210	H 209.957.4164	wa6tpe@gotnet.net
Wave Wilson Area 3 Co-Chair	4565 Bocana Road Cameron Park 95682-4046	(530) 672-0610	wave@directcon.net
Teri Gerritz Area 4 Co-Chair	1335 Bonita Avenue Berkeley, CA 94709	C: 510.541.0639	tgerritz@yahoo.com
Barbara Diskowski Area 4 Co-Chair	2085 Banbury Rd Walnut Creek 94598-2310	H (925) 938-7374 C (925) 639-9787	docbarbara@aol.com
Jill Bohn Area 5 Chair	688 N White Road San Jose, CA 95127	H 408.258.7421 C 408.234.2617	bohnjill@sbcglobal.net
Rich Gipson Area 6 Chair	3505 Vernal Court Merced, CA 95340	H 209.723.3323 C 209.761.0571	rich.gipson@sbcglobal.net
Belinda Lister Area 7 Chair	2918 Joaquin Dr Burbank, CA 91504	H 818.842.6468 C 818.427.1933	belindalister@charter.net
Lily Cooper Area 8 Chair	2163 Roanoke Rd San Marino, CA 91108	H 626.284.6753 C 626-940-7084	lmcooper99@earthlink.net
Craig Borba Area 9 Chair	1205 Camino Mirasol Palm Springs, CA 92262	H 760.861.5428 C 760.861.5428	borbac3@gmail.com
Lynn Lindsey Area 10 Chair	297 Canyon Acres Drive Laguna Beach, Ca. 92651	H 949.497.2686 C 949.246.2356	mlindsey300@msn.com
Violet "Vi" Huprich Area 11 Chair	3605 Leland Street San Diego, CA 92106	H 619-224-0679 C 619-987-0679	vihuprich@cox.net
Lois Selna Area 12 Chair	PO Box 370 El Granada, CA 94018	H 650.712-0271	bernardselna@comcast.net ltcrod@juno.com

→ → → Email to entire committee by those on this list: calrta-legislation-committee@googlegroups.com



CalRTA Meeting Minutes – UNAPPROVED

CalRTA Government Relations Committee
September 5, 2013, Hilton Costa Mesa

Attendees:

Irene Wetzel, Chair
Lloyd Gillespie, Area I
Don Goodykoontz, Area II
Helen Holt, Area III
Barbara Diskowski (for Teri Gerritz), Area IV
Jill Bohn, Area V
Rich Gipson, Area VI
Belinda Lister, Area VII
Lily Cooper Area VIII
Craig Borba, Area IX
Bob Parish, Area IX
Lynn Lindsey, Area X
Violet Huprich, Area XI
Lois Selna, Area XII

Guests:

Pat Boyd, Area III Director
Judy Smith, Area X Director, Board Liaison
Carole Luhning, Area VI Director, Board Liaison
12 Guests

Staff:

David Walrath

Government Relations Committee Chair, Irene Wetzel, convened the meeting at 11:00 a.m. on Thursday, September 5, 2013. She provided an overview of the Committee reorganization. There will be a continuing need for information and experience on issues related to insurance. The Committee members introduced themselves and the guests from their areas.

Lloyd Gillespie moved to accept the minutes; Lois Selna seconded. The minutes were accepted.

The agenda was approved with an amendment on the Advocacy Day date.

Chair Irene Wetzel presented the CalSTRS liaison report that had previously been sent to Committee members. Irene presented Paula Weiss' report on Senior Coalition meetings and issues.

The Committee then discussed the Committee Reorganization proposal. There was concern on how the Government Relations Committee would be involved with insurance issues – especially for retirees who are not yet eligible for Medicare. Irene recommended that President Kipp would address the Committee to provide more information. The Committee ended discussions waiting for President Kipp’s comments.

David Walrath updated the Committee on CalSTRS full funding, WEP/GPO, and CalPERS Long-Term Care. He reported that CalSTRS full funding still is a challenge. While there was some hope for action in June, the issue was deferred until 2014 because the Administration was not ready to consider funding options.

The WEP/GPO legislation, “The Social Security Fairness Act of 2013,” has 88 co-sponsors to H.R. 1975 and 12 co-sponsors for the U.S. Senate bill S. 896. Letters, post cards and emails still are needed. The Committee was encouraged to send thank you letters to the California co-sponsors, and a letter urging co-sponsorship to the California members who have not yet co-sponsored the legislation – especially Senator Feinstein. Irene reminded the Committee and guests that CalRTA is helping to finance the Social Security Fairness website.

David Walrath outlined the current status of the CalPERS Long-Term Care program. There still is not significant change proposed by CalPERS to the contribution premium increase, but the discussions will continue. He mentioned the new litigation that has been filed. Because the issue is before the courts, neither the Legislature nor the Administration will be taking any actions until there is some resolution to the litigation. The Board had taken an opposed position to the CalPERS Long-Term Care increases of 85%. There was discussion as to how many CalRTA members 85% increase had impacted. A motion was made and seconded to recommend to the board, a survey be created to identify the number of CalRTA members effected by the 85% increase. Motion carried.

The Committee recessed at 12:30 p.m. to reconvene at 1:45 p.m.

President Kipp presented the concept for the three standing committees: Communications & Technology, Membership Recruiting, and Governmental Relations.

He used the following example – The former Insurance Committee content will be allocated to the three standing committees. Legislation affecting insurance will be under the Governmental Relations Committee, while insurance issues information would be from the Communications Committee. Membership recruitment would include materials regarding insurance. The three chairs will work together and address how to coordinate to ensure members continue to have the information and political action they expect on all significant issues. Additionally, the Board of Directors can appoint ad hoc committees to address specific issues.

Debbie Pate-Newberry has a one-page explanation of how the new committees will coordinate.

President Kipp emphasized the need to increase membership with innovation and using all membership-increase recommendations. Research indicates that new members are interested in specific issues and activities, but do not want to make long term commitments.

The Committee reviewed the status of legislation with positions. The Committee discussed AB 1381 but did not change position on the bill that addresses possible pension spiking and avoiding the CalSTRS earnings limitation. The “Insurance Rate Public Justification and Accountability Act” was reviewed. The Act is an initiative that has qualified for the November 2014 Statewide General Election ballot. It will not have a ballot proposition number until mid-2014. It was moved by Craig Borba, and seconded by Lois Selna that the Government Relations Committee recommend a Support position to the Board of Directors. The motion carried.

David Walrath updated the Committee on pension attacks and litigation. He discussed the litigation on San Jose and San Diego voter approved pension changes and the Stockton, San Bernardino and Detroit pension issues affected by bankruptcy filings. Pension attacks are expected to continue but through initiatives and court actions rather than legislation. He advised the Committee that the well-funded groups have not given up on their efforts to oppose and end public pensions.

The CalSTRS unfunded obligation and the Governmental Standards Board’s accounting changes were discussed. Mr. Walrath indicated that he expected the CalSTRS funding legislation to be acted on in 2014.

Irene Wetzel discussed Advocacy Day 2014, March 18th, and who would be responsible for making meeting appointments. The Committee discussed timing for materials and meetings. She then presented materials and information for the Area Workshops.

The Committee discussed the 2014 Goal Survey and its use in the Area Workshops. Mr. Walrath was responsible for providing a draft to the Committee members. The survey will be available on the website and hard copy.

The Committee reviewed the division and area assignments for Advocacy Day. The problem of even numbered State Senate districts was discussed. Irene will send the 2011 assignments for those districts. The Committee will respond to Irene and David on the division assignments.

Meeting adjourned at 5:00.

CalSTRS Report, February 5-7, 2014
By Patricia K. Geyer, CalRTA Liaison
CalSTRSreport.com

Summary

1. The Audits and Risk Management Committee approved the Charter Review. The new charter will support a system of enterprise-wide risk management
2. GASB new standards proposal of Fair Value Measurement will begin in 2014. The New Standards will take effect 2015-16
3. The Governor's Budget proposes that work begin on a funding plan, to be enacted as part of the 2015-16 budget, that gradually increases contributions paid by the state, employers, and members to fully fund the DB Program within 30 years.
4. Jack Ehnes, CEO reported that CalSTRS is committed to move forward on increasing CalSTRS funding.
5. Joy Higa has been appointed to the CalSTRS Board by Governor Brown

Audits and Risk Management Committee

The Committee approved the Charter Review. The new charter will support a system of enterprise-wide risk management. The Audits and Risk Management Committee's responsibility is to evaluate the effectiveness of the risk management framework and to review emerging and significant risks specific to the areas of responsibilities of the ARM Committee.

Robin Madsen, CFO and Peggy Plett, Deputy CEO, Benefits and Services reported on corrective action taken in response to the auditor's report. (1) Accurate member data remains a challenge. Management agrees that inaccurate or incomplete member data reported by employers is a primary cause of errors. (2) Five new auditor positions have been added and three more are needed. (3) The goal is to identify errors early because the adjustment to the member's pension will be less. If member paybacks are not sufficient CalSTRS has authority to collect the remaining debt from employers, if the employer caused the error.(Education Code 22008). David Davini, ASCA Retired spoke about his concern about the increase in individual appeals as the result of audits. Ed Foglia, CTA-Retired spoke about his concern that older teachers, long retired could see their pensions reduced because of payment errors. Representatives from CTA, ASCA, Small School Districts and the California Department of Education expressed concerns. A progress report on audits was presented. GASB new standards proposal of Fair Value Measurement will begin in 2014, with a statement due December 2014. The New Standards will take effect 2015-16. Kirk Marsten was introduced as the CalSTRS Internal Audit Manager. Many Ann Campbell-Smith present Chief Auditor will retire May 1.

Legislative Committee

The Legislative Committee met to hear the Federal Legislative Report by John Stanton. John Stanton reported that the upcoming elections will influence legislation. The House of Representatives will likely stay Republican because Democrats would have to win 17 seats. The Senate will stay Democrat. There is lack of cooperation. California Democratic delegation is losing influence due to retirement of members.

John Stanton saw the following future challenges: (1) Federal Budget, total spending is capped, (2) Affordable Care Act, (3) Tax Reform. Congress is looking for ways for private capital to help fund infrastructure. This may be an investment opportunity for CalSTRS. There is a crisis coming in retirement because individual savings are inadequate.

Teachers' Retirement Board

The Board heard proposed updates to the Strategic Plan (2012-2017). Some of the changes were to add emerging market managers to provide diversification and add value; to add under Goal 4 object E – Analyze and adopt ways to become more cost-effective while still achieving the board's desired level of service to members and customers.

The Board approved the Risk Management Policy amendments. The Board shall have primary responsibility for CalSTRS enterprise-wide risk oversight, while board committees are chartered with oversight of specific areas of risks.

Ed Derman, Deputy CEO, reported on the impact of further delays in funding. If the funding increase occurred in 2012 14.6% of pay is needed. If funding increase was delayed to 2017, 23.7% increase as a percent of pay is needed. The Governor's Budget proposes that work begin on a funding plan, to be enacted as part of the 2015-16 Budget, that gradually increases contributions paid by the state, employers, and members to fully fund the DB Program within 30 years. CalSTRS is still committed to funding now because waiting is expensive.

Jack Ehnes, CEO reported that CalSTRS is committed to move forward on increasing CalSTRS funding. The options are (1) incorporate funding into trailer legislation as part of the 2014-15 budget, (2) including funding as part of the January 2015 proposed state budget, (3) passage through specific legislation such as AB 6121 (Bonta) which is serving as a placeholder.

The Board heard an update on the BusinessRenew Computer projects.

Joy Higa has been appointed to the CalSTRS Board by Governor Brown. She has held multiple positions at Untied Health Group since 2006. Previously Joy held positions at the California State Controller's Office (2004-06) and at the Office of Governor Gray Davis (2003).

The material below was prepared by Paula Weiss
February 7, 2014

Client Advisory Committee

On February 19, 2014 at 10:30 in room 444 there will be an informational hearing on CalSTRS unfunded actuarial obligation. There will be two additional hearings. Prop 98 issues need to be explored. The shortfall has accumulated over decades. A spot bill is available to carry the language. Legislation may be presented by the end of August, or possibly with budget bills in June.

The Reed anti-pension initiative is essentially dead. A lawsuit has been filed to get the title and summary language changed, but that most likely will not leave enough time to gather signatures. Reed may try again in 2016.

The annual fund valuation for fiscal 2012 - 2013 will be presented at the April 2014 meetings. A CAFR (comprehensive annual financial report) will also be prepared. These documents are necessary to prepare the GASB and other financial reports.

A GASB (Governmental Accounting Standards Board) update was presented and discussed. Agencies are still waiting for additional guidance material. CalSTRS is making every effort to reach and train personnel in county offices and school districts. The discussions have been fruitful. We now know the distribution breakdown of the GASB Net Pension Liability on the employers' balance sheets. The NPL has been calculated as \$167 billion. 37% of that number will appear on the State's statement. 63% will be distributed proportionately on the 1700 state school districts. The timeline for posting this information is fluid and there are possible scenarios. The decisions on district numbers will be made in April of next year. It is important to

remember the GASB numbers are for GASB only. The actuarial unfunded obligation remains the same and is considered the "real" number by CalSTRS.

There was a long discussion about overpayments to retirees. \$50 million in over payments have been made this year. That money is not available for investments. Mistakes are made by all those involved, from computer errors, CalSTRS errors, district reporting errors, confusion about funds that should go into DBS instead of DB, confusion about what constitutes credible compensation, and unfortunately efforts to spike pensions. IRS requires overpayments to be collected, first from the retiree, and if not paid in full, from the school district. There is a 3 year statute of limitation for collection from the date an audit finds the discrepancy. A pension plan must be administered according to IRS code to retain its IRS tax qualification

Active teachers receive annual retirement reports. Starting next year those reports will only be sent electronically unless there is a written request. This report should be reviewed carefully for potential errors. It is especially important for those nearing retirement because errors that result in overpayment can also result in the member having to repay that amount up to 5% from each pension check. That can be a real hardship for the member. Pre retirement counseling is also very important for a secure retirement.

CIO (Chief Investment Officer) Chris Ailman dropped in to say hello. Today CalSTRS is valued at almost \$ 176 billion. A market selloff in January has resulted in the drop in value. Longevity for California teachers is the highest in the nation. Those who are 60 can expect to live another 27 years. There are about 500 members over 100. 72% of members are women, nonsmokers, and drink red wine.

Investment Committee

The value of the pension is about \$176 billion, down from \$181 billion at the end of December. There is a negative cash flow of about 1/2 billion a month. Chris Ailman, CIO, reported that the "markets got ahead of themselves" and there was a selloff (-2.5%) in January. US equities were up 33%, but the EU is an "albatross." CalSTRS' portfolio out performed its benchmark in 5 out of 6 classes. Fixed income was "less down." Real corporate earnings declined. Profits were made from cutting, not from growth. Ailman said, "We can't cut our way to growth." Many companies, (tech) are still sitting on large amounts of cash. GDP is predicted to grow slowly, between 2-3% through 2014 - 2016. Risks to the economy include partisan conflict over raising the debt ceiling and fears within the market.

The state has approved the position of deputy chief investment officer. Michelle Cunningham is acting in that capacity. Other positions have opened up, and Mr. Ailman reports that the improved salary structure has been great for recruitment. Top level senior investors from other funds have been applying.

The Board then explored policy revisions for Global Equity, Real Estate, and Infrastructure investments. Staff was requesting more flexibility for external, active management for Global Equity. In real estate, the benchmark should reflect the strategy which emphasizes lower risk investments. The Board will revisit these proposals in April. I believe the changes in the infrastructure policy were approved.

Investment is understaffed. There may be 2 or 3 new hires by the summer.

Brian Bartow, general attorney and legal advisor to the Board, presented a proposal requesting the hiring of an additional attorney specializing in foreign equity. International law and courts operate under different rules. This was the first reading and will be returned to the Board for further review and discussion.

There is a need to review the policy on investment in CA. What goals do we want for CA? What does it mean to be a CA investment when so many companies are global? Since this is an election year, CA investing could be a high profile issue.

The next investment committee meeting will be April 7-9 and will be long.

“Friends of CalRTA” Recognition Award - Criteria

Purpose: CalRTA stated policy of political non-partisanship lends itself to the need for giving expression of appreciation to legislators and officials in government, who demonstrate support for CalRTA missions.

Process: During January, annually, the Government Relations Committee seeks nominations of legislators and officials from Divisions to include a brief rationale about legislators and officials which deserve recognition. The names and criteria of nominated supporters of CalRTA, and the after discussion, and advice from our Advocate, the committee selects one name in each of these 4 categories (in the case of a tie, two names):

- California State Assembly member
- California State Senate member
- California Government official, not in the Legislature
- Federal official, elected or appointed

The selected names are recommended to the CalRTA State Board in March. Approved selections are awarded recognition during the May Convention. The CONTACT publication covers the Recognition Award.

Criteria - The legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

Procedure Dates:

- January 30 – Division Legislation Chair submits legislator/official nomination to Area Legislation Chair with a brief summary of rationale (one paragraph and/or bullet points, limited to one page).
- February – A compiled list is sent to State Government Relations Committee for review with input from the Legislative Advocate
- March – Committee meets and selects Friends of CalRTA for recommendations to the Board
- May Conference and CONTACT – Friends of CalRTA are recognized



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 52 Submitted by Russ Rackow, President (925) 934-5278
Richard Merrill, Awards Ch. Phone (925) 939-7838
Send to Area Legislation Chair by February 28.

Nominee Susan Bonilla serving for term of (years) 2
Category: California State Assembly member California State Senate member
 California Government official, not in the Legislature Federal official, elected or appointed

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

We are privileged and delighted to nominate Assemblywoman Susan Bonilla for the "Friends of CalRTA" Recognition Award. During her terms in the Assembly, she has amply demonstrated a commitment to supporting and improving public education in California. She has sponsored legislation to modernize and upgrade assessment of student performance in line with the Common Core standards. *It is important to note that she brings the perspective of a former teacher to this important task.* As chair of the Assembly Select Committee on Increasing the Integration of STEM Education in California K-14 Schools, she has written and spearheaded legislation to financially support and greatly enhance science, technology, engineering and mathematics education in California, in full concert with State Superintendent of Public Instruction, Tom Torlakson. This legislation will, with cooperation of local businesses and industries, provide job training for students as well improving preparation for post-high school education.

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

In our interactions with Susan Bonilla we have found her to be approachable, respectful, and a good and responsive listener. She has taken the time to address our membership at one of our meetings, and she has left no doubt as to her awareness and concern regarding the needs of retired educators as well as her proactive commitment to safeguarding and improving California public education.



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 2 Submitted by Legis. Comm. & Executive Phone 510-521-2014
Send to Area Legislation Chair by **February 28.** Board - Karen Ratto

Nominee Rob Bonta serving for term of (years) about 2 yrs
Category: California State Assembly member California State Senate member
 California Government official, not in the Legislature Federal official, elected or appointed

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

- Bonta's first effort to address CalSTRS unfunded obligation began in his 1st year of office. Now, he is the co-sponsor of AB 611 which would address that same unfunded liability & help to develop a long term funding solution toward closing ^{the} \$71 billion shortfall.
- At our February luncheon he voiced his support for mandatory kindergarten & the funding to do it as well as pre-school for all 4yr olds

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators see above
- To safeguard the State Teachers Retirement System see above
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

- Bonta supports the repeal of the WEP/GPO. (~~HB 1795~~)
- Authored AB 514, "Safe Schools for Safe Learning Act" increasing resources for children exposed to gun violence, trauma, & violence related to guns. (passed)
- Authored AB 876 which promotes advanced technologies in schools & libraries (passed)

Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 5 Submitted by Paula Weiss Phone 916-487-9251 or Email weiss@winfirst.com

Nominee Joan Buchanan Assembly serving term in years 2008-2014

Category

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Criteria: Lifetime of dedication to public schools

- Chair of the Assembly Education committee
- Elected to the CA Assembly in 2008; termed out 2014
- Single mom raising 5 children
- Community activist and PTA leader
- 18 years in the San Ramon Valley School Board
- Received CTA State Gold Award

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

Rational:

- Gave an inspirational speech on education at the Delta Kappa Gamma Legislative Study Session, June 2013
- Presented an award to CalRTA division 52 at their meeting, spring of 2013
- Involved in negotiations of Local Control Funding Formula
- Her sponsored bill, AB 620 was signed by the governor. It would require senior and disability facilities to notify families and law enforcement should a patient go missing.

Sponsored chaptered legislation to curtail the use of expensive capital appreciation loans by school districts

For her dedication to serving education, students, and teachers, Division 5 nominates Joan

NOMINATION FORM: "FRIENDS OF CALRTA" RECOGNITION AWARD

Nominating Division Division 1 Pasadena-Foothill Submitted by Lily Cooper

Nominee Senator Ed Hernandez serving for term of 2010-2014. **CA State Senate 24th District**

CRITERIA – EXPLAIN HOW THE LEGISLATOR ...HAS DEMONSTRATED ONE OR MORE:

CONSTANT ALLIANCE WITH CALRTA GOAL OF PENSION PROTECTION

Voting record suggests his support for protecting our pensions. 2013 Ratings for votes on <votesmart.org> *100% by Congress of California Seniors *90% by California School Employees Association (Classified) *96% by California Labor Federation, AFL-CIO

AUTHORS OR CO-AUTHORS BILL(S) TO PROTECT OR ENHANCE PENSIONS

Co-sponsored SB 1234 -- establishes Retirement Program for Private Sector Employees

SUPPORTS CALRTA'S LOCAL ACTIVITIES: PROTECTING MEDI-CAL & AFFORDABLE CARE ACT

On October 21, 2013, Division 13 invited all members of Area VIII to hear **Senator Hernandez's presentation on the Patient Protection and Affordable Care Act of 2010 (ACA/ Obamacare)**.

His Power Point, handout, and Q & A relieved anxiety. He still promotes the ACA in his district.

An optometrist with his wife, Dr. Hernandez ran for office to reform health care. To him, " **the absolute, most important issue at hand is the success of the [health benefit] exchange,**"

Covered California. As Chair of the Senate Health Committee, he wrote an avalanche of bills to smooth implementation of the ACA, expand Medi-Cal, relieve the expected physician shortage (SB 493, SB 20), and develop Covered California's marketplace. While all CA health insurance plans are more accessible and affordable since the ACA, the senator's work goes on.

CHAMPIONS THE WELFARE OF PUBLIC EDUCATION

SB 532 - Pupil instruction: high school curriculum (chaptered)-- rigor for all, **SB 1423 - Public school accountability: statewide system** --better options for ELL, **Senate Constitutional Amendment 5 (SCA 5)**-- ends Proposition 209's ban on "Affirmative Action" at CA's public universities/colleges. Ratings for votes: 2013 86% Children's Advocacy Institute, 2012 60% CSU.

BRIEF RATIONALE – EXPLAIN HOW NOMINEE IS RELEVANT TO CALRTA MISSIONS:

TO PROMOTE, PROTECT AND ADVOCATE FOR THE INTERESTS OF RETIRED PUBLIC CALIFORNIA EDUCATORS PENSIONS:

Voting record rates well with seniors, classified employees, and unions. **HEALTH CARE:** ACA benefits help retired educators by covering younger retirees and expanding Medi-Cal to improve benefits, raise the ceiling to \$15,856 per year (2013), include single adults with and without children, and improve benefits. The dreaded "donut hole" for undiscounted medications will gradually disappear. **EDUCATION:** Affirmative action and more rigorous public schools will prepare more citizens for the modern intellectual and technical economy.

TO SAFEGUARD THE STATE TEACHERS RETIREMENT SYSTEM

Great voting record for helping seniors, classified school employees, and unions.

TO STUDY AND PROMOTE OR OPPOSE STATE AND NATIONAL LEGISLATIONS AFFECTING THE INTERESTS OF RETIRED EDUCATORS

Great voting record on public health care and public education suggests that he would protect and enhance public pensions. Sponsored SB1234 for private pensions. Passion for establishing the ACA and, eventually, a single payer system.

TO PROMOTE AND SAFEGUARD PUBLIC EDUCATION SYSTEMS

Legislation and voting promote "Affirmative Action" for broader college admission opportunities, more rigorous curriculum, school choice, and educational accountability.

CalRTA Area VII Recommends The Honorable Senator Fran Pavley, District 27, for the 2014 Friend of CalRTA Award

As a champion of public education and the issues that affect both teachers and students, Senator Fran Pavley is our champion. She has 28 years of teaching experience in the public schools, is married to a retired educator, and has demonstrated her support of the issues supported by CalRTA and the need to fully fund our pension system.

As a California Senator, she has made herself available to her teacher constituents by having her District Educational Specialist, Marie Lakin, attend local CalRTA association lunches where members have been able to establish a direct liaison with Senator Pavley's office. Through her district and state staff, and her own availability, Fran Pavley is a highly visible public servant who has made known that one of her top priorities continues to be education.

As a legislator, Senator Pavley is aware and supports CalRTA's mission of pension protection for all retired California educators. She understands and supports the need to safeguard the State Teachers Retirement System. Her background in education makes her knowledgeable about our issues. She is opposed to the Social Security WEP/GPO penalties, which eliminates the ability of school districts to hire retired scientists and mathematicians as they would lose their social security benefits.

As an elected official, Senator Pavley has excelled in every post she has held. In 1982, the Senator became the first Mayor of the City of Agoura Hills, and subsequently served four terms on the City Council. In 2000, she was elected to the California State Assembly where she served three terms. Currently, Senator Pavley represents 931,000 people in the 27th District, which includes parts of Los Angeles and Ventura Counties.

As a legislative leader, Senator Pavley, a native Angelino, puts her CSUN Master's Degree in Environmental Planning to good use daily as she supports those issues that contribute to improving our environment. She is currently working to increase the supply of cleaner alternative fuel and energy efficiency projects for schools and other public buildings. Her recent support of educational issues includes SB 35, SB 212, SB 236 SB 267 and SB 368. In addition to being an education champion, Senator Pavley was recognized in 2010 when President Obama implemented national clean car standards, modeled on AB 1493 (Clean Car Regulations) also known as the "Pavley Law."

In summary, whether it is education, health, energy, utilities and communication, transportation or environmental quality, we have in Fran Pavley a leading legislator who is a friend and ally to CalRTA. She is the obvious choice for the 2014 Friend of CalRTA Award.



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 5, Submitted by Paula Weiss Phone 916-487-9251 Email
weiss@winfirst.com
Send to Area Legislation Chair by **February 28**.

Nominee: Darrell Steinberg, Pro Tempore of the California State Senate, serving terms in both Assembly and Senate 1999 - 2012

Category

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Senator Steinberg is nominated for decades of outstanding public service. A lawyer by trade, he was an employee rights attorney for CSEA for 10 years, an Administrative Law Judge, and a mediator. He served on the Sacramento City Council for 6 years and was a state Assemblymember from 1999 to 2004. Steinberg was elected to the State Senate in 2006 and has served as its leader since 2008. He has championed public education through college level, and passed proposition 63, which provided funding for mental health services. Working with two governors during the great recession, he helped shepherd budgets to passage that dealt with \$42 billion in deficits. He helped temper Governor Brown's initial pension reform proposal preserving the CalSTRS' defined benefit plan. His hand has touched countless legislation dealing with environmental issues, health care, and school funding, including the new Local Control Funding Formula. Senator Steinberg also worked to dis-incentivize "teaching to the test" and to prepare high school students for the workforce. Presently he is also trying to find a solution to the state's overcrowded prison problem, one that provides needed health and rehabilitation services and reduces recidivism.

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

On December 19, 2013 Senator Steinberg made a public statement, "I think we need to begin addressing the CalSTRS problem this year, yes. I think that ought to be a priority," he said. This powerful statement gives both CalSTRS and CalRTA hope that this will indeed happen.

Senator Steinberg also was a speaker at a CalRTA Fall workshop and he spoke in support of single payer health care at a meeting led by former CalRTA president, Joe Dion.

Division 5, the State Capital Division, has many members residing in Senator Steinberg's district. It has been our responsibility to present CalRTA's positions to his staff on our Advocacy Day visits. Senator Steinberg will be "termed out" in 2014.

We are honored to nominate a great leader, and a person who so ably represented the people of California, Senator Darrell Steinberg as a Friend of CalRTA.



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division **16** Submitted by **Ken Hewitt**

Phone or Email **Hewitt@pacific.net**

Send to Area Legislation Chair by **February 28**.

Nominee **Chris Ailmen, CalSTRS Chief Financial Officer**

Category Friend of CalRTA—California Government Official, not in the Legislature

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Chris Ailmen Chief Financial Officer of CalSTRS.

- Manages \$750 Billion pension fund invested world-wide. (The second largest pension fund in the world.)
- The returns provide about 65% of our retirement check each month.
- He is well-respected both in CalSTRS, CalPERS, and across the country into Washington D.C. where he often consults.
- Presented impressive PR on public television stations.
- Received awards from prestigious financial institutions

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

Mr. Ailmen:

- Is the epitome of a people-person, or more specifically, service to the retirement members
- Freely gives of his time and provides financial information that is clear and up to date
- Speaks at Area Workshops—Div. 16 was his guest at a recent visit to the Investment Department staff of CalSTRS
- Attends the Client Advisory meeting when we need to ask him questions regarding the unfunded obligation and GASB
- Has provided excellent service to CalRTA whenever we call on him.

Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division: 5, Submitted by Paula Weiss, Phone: 916-487-9251 Email: weiss@winfirst.com
Send to Area Legislation Chair by **February 28**.

Nominee Sharon Hendricks, Member of the CalSTRS Board

Category: CA Gov. Official, not in the legislature

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Elected to the CalSTRS Board of Trustees in 2011; Represents active community college members of CalSTRS. Ms. Hendricks is active in the AFT, Community College Council, and the CFT. She is a professor of speech at LA Community College. Serves as Chair of the Benefits and Services Committee. Serves as Chair of the Legislative Committee. Vice chair of the investment committee. Guided the committee through difficult decisions in the absence of the chair. She also serves on the appeals and compensation committees.

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

Ms. Hendricks has been asked to rise to the occasion of CalSTRS leadership. She has worked with David Walrath and other stakeholders in their efforts to find a solution to CalSTRS unfunded liability. A telling situation for me was when the CalSTRS Board engaged in a long discussion about what constitutes a CalSTRS pension. Ms. Hendricks made the motion that seeking a long term funding solution for the CalSTRS' Defined Benefits Program embodies the importance and sustainability of a defined benefit program as the foundational component of teachers' retirement. Taken in the context of the governor's pension reform proposal for a hybrid pension plan with a significant defined contribution component, this was a dynamic statement in favor of our retirement security.

For a period of about six months, Ms. Hendricks was acting chair of the Investment Committee. This is an enormous responsibility. Amongst the decisions being made were the risk assessment and asset allocations of the CalSTRS portfolio.

Ms. Hendricks routinely comes down to the audience at the CalSTRS' meetings to talk to retirees. She is available to us.

Considering the enormity of Ms. Hendricks' fiduciary responsibilities on the CalSTRS' Board of Trustees, and her continuing dedication to serving her constituencies, we nominate Sharon Hendricks as a Friend of CalRTA.

NOMINATION FORM: "Friends of CalRTA" Recognition Award

Nominating Division 1 Pasadena-Foothill Submitted by Lily Cooper <lmcooper99@earthlink.net>

Nominee Representative Xavier Becerra serving term in years 4 years from 2013, 1992-present

Category: legislator--House of Representatives, 34th Congressional District

CRITERIA – EXPLAIN HOW THE LEGISLATOR ...HAS DEMONSTRATED ONE OR MORE:

x CONSTANT ALLIANCE WITH CALRTA GOAL OF PENSION PROTECTION Influential ally on SS pension and disability protection. Chairman of House Democratic Caucus. Senior member of House Ways and Means Committee that formulates Social Security and Medicare laws. Ranking Democrat on Subcommittee on Social Security. Democratic member of the House Select Committee on Deficit Reduction. Said that SS is "a sacred bond between young and old, rich and poor that has made America a better country." and "I believe we have no more important responsibility than to make sure that Americans receive their earned Social Security benefits on time, and in full."

x AUTHORS OR CO-AUTHORS BILL(S) TO PROTECT OR ENHANCE PENSIONS **H.R. 4090 (2-16-14): The Social Security Fraud and Error Prevention Act of 2014** protects benefits, recoups money, enhances punishments. **H.CON.RES.101:** reforms tax code and strengthens retirement security.

x SUPPORTS CALRTA'S LOCAL ACTIVITIES: PROTECTING MEDICARE AND THE AFFORDABLE CARE ACT Sole leadership vote against the fiscal-cliff deal because "there's no justification" for cutting SS & Medicare to pay for wars and tax cuts. His website clearly lists the benefits of the Affordable Care Act: reforming preexisting conditions exclusions, adding young adults to parents' plans, saving seniors thousands in meds' costs per year, ETC. Defends president's extensions of deadlines, as necessary with a "do-nothing" Congress." Voted for over a million dollars in grants to community health centers.

x CHAMPIONS THE WELFARE OF PUBLIC EDUCATION 2012 urged action to prevent student loan interest rate hike **SPONSORED LEGISLATION * H.R.1842 : Development, Relief, and Education for Alien Minors Act of 2011 (DREAM Act)** ends deportation, allows permanent residence, and encourages education of illegal immigrants with good moral character who were brought to US before 15 years old. ***H.R.3569 : Native Culture, Language, and Access for Success in Schools Act--** school improvement programs with diverse teaching/learning and standards-based tests. **CO-SPONSORED LEGISLATION *H.R.3538 : Affordable College Textbook Act *G.I. Bill of Rights for the 21st Century 2008** restored promise of four-year college education for about 2 million Iraq and Afghanistan veterans for up to 15 years (was 10) after they leave active duty.

BRIEF RATIONALE – EXPLAIN HOW NOMINEE IS RELEVANT TO CALRTA MISSIONS:

x TO PROMOTE, PROTECT AND ADVOCATE FOR THE INTERESTS OF RETIRED PUBLIC CALIFORNIA EDUCATORS Supports Social Security & opposes Chained CPI's (eventually over 9% cuts in benefits).

x TO SAFEGUARD THE STATE TEACHERS RETIREMENT SYSTEM House record suggests support of CalSTRS' positions. Said, "Social Security didn't get us into this mess—and privatizing it won't get us out." Supported reforming SS without reducing benefits. Opposed using 4% rate of return, like GASB.

x TO STUDY AND PROMOTE OR OPPOSE STATE AND NATIONAL LEGISLATION AFFECTING THE INTERESTS OF RETIRED EDUCATORS PENSIONS: Opposed the House Public Employee Pension Transparency Act HR 567 requiring a "risk free" rate of return of about 4 percent, instead of the historical rate of about double that that is used by most plans-- and would prohibit federal bailouts of public pensions...(He) said that the legislation is designed to end public sector defined benefit plans" **SOCIAL SECURITY: Supports reforming SS without reducing benefits** because it is "the most effective government program in our history." Said, "it will be my mission to protect Social Security from any attempt to harm the program, or break the bond (among all Americans)" Voted in Oct 2013 for COLA increase for SS beneficiaries. Co-sponsored SS Fairness Acts. **HEALTH:** Voted for women's health rights.

x TO PROMOTE AND SAFEGUARD PUBLIC EDUCATION SYSTEMS Voted against 2011's HRes 186 reauthorizing the SOAR Act to award grants to expand school choice in DC. Voted for 2009's HR 2187 **Green Public Schools**, "grants to states for the modernization, renovation, or repair of public schools..."



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 23 Submitted by Marilyn Seeling Phone (805) 773-8473
Send to Area Legislation Chair by February 28/

Nominee Lois Capps, US Senator serving for term of (years) 1.5
Category: California State Assembly member California State Senate member
 California Government official, not in the Legislature Federal official, elected or appointed

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

She was an original cosponsor of the Social Security Fairness Act (HR 1795) which would eliminate both the O.P.O. and W.C.P. She has steadfastly worked to have these penalties removed for retired teachers.

She helped pass, into law, legislation that helped save over 250, teaching jobs on the central coast due to state and local budget cuts.

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promote and safeguard public education systems

She has a special interest in promoting headstart and early childhood education programs. Promoting these programs is a high priority of her legislation goals.

She has authored, and passed legislation that provide funds for school based health centers to provide equity, accessible, high-quality preventive, health care, mental health services, and social services to students.



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division Area IV 58 Submitted by Eleanor Ng Phone (925) 934-5731

Send to Area Legislation Chair by **February 28.**

US House of Representative Legislative Chair

Nominee George Miller serving for term of (years) 39 yrs

Category: California State Assembly member California State Senate member
 California Government official, not in the Legislature Federal official, elected or appointed

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Constant alliance with CalRTA goal of pension protection
Support HR1795

Compelled to Champion the welfare for public education
Support Affordable Care Act
Support California Coalition for Social Security Fairness
Continue his work to make college more affordable
& to overhaul the No Child Left Behind Act so
that every child access to a world-class education

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

Promote, protect, & advocate for the interest of retired
public California educators

Support + concerned for all of the public servants
who are negatively effected by social
Security laws

Sponsored local + Community Activities & projects



Nomination Form: "Friends of CalRTA" Recognition Award

Nominating Division 2 Submitted by Legis. Comm & Executive Phone 510-521-2014
Send to Area Legislation Chair by **February 28.** Board- Karen Ratto

Nominee Eric Swallowell serving for term of (years) about 2 years
Category: California State Assembly member California State Senate member
 California Government official, not in the Legislature Federal official, elected or appointed

Criteria – Explain how the legislator or official has demonstrated one or more:

- Constant alliance with CalRTA goal of pension protection
- Authors or co-authors bill(s) to protect or enhance pensions
- Support for CalRTA local activities
- Compelled to champion the welfare for public education

Perhaps by virtue of being a Democrat, Eric is very supportive of public education, retired educators, and our children. CA concerns are Eric's concerns.

- He was an early supporter to repeal the WEP/GPO. HR 1795
- Voted against a budget that would cut critical programs like HeadStart.
- Co-sponsored HR 1089, legislation that would help spur innovation & funding to prepare students for careers in STEM.
- Working to abolish or completely overhaul NCLB (see website)

Brief Rationale – Explain how nominee is relevant to CalRTA missions:

- To promote, protect and advocate for the interests of retired public California educators see above
- To safeguard the State Teachers Retirement System
- To study and promote or oppose state and national legislations affecting the interests of retired educators
- To promoted and safeguard public education systems

- Co-sponsored & voted to strengthen the "Violence to Women Act"
- Co-sponsored the "Reuniting Families Act" to ensure that updates to our immigration system include reforms to allow families to reunite in the US
- Co-sponsored legislation to require background checks at gun shows to keep guns out of the wrong hands.
- At the close of 2013, Eric urged immediate extension of unemployment insurance benefits.

By far, Swallowell's Townhall meeting was the best of the locals we attended in 2013; well prepared, knowledgeable, & approachable.

B A L L O T
FRIENDS OF CaIRTA
2014

California State Assembly Member

Susan Bonilla

Rob Bonta

Joan Buchanan

California State Senate Member

Ed Hernandez

Steve Knight

Fran Pavley

Darrel Steinberg

**California Government Official not in
Legislature**

Chris Ailmen

Sharon Hendricks

Federal Official Elected or Appointed

Xavier Becerra

Lois Capps

George Miller

Eric Swallwell

Adam Shiff

CalRTA Government Relations Committee

March 2014, Agenda Item

DRAFT PROPOSAL: CalRTA Recognition of Division Advocacy Activities

An "Honor Roll" type list which, possible icon with year for website, etc.

Purpose: To recognize division participation in advocating CalRTA legislative issues

Documentation: Date(s) and Activity, document is applicable

Provides Member Information and Support

- Legislation items in all Division Newsletters
- Meeting time provided for legislation information
- One meeting a year includes a presentation, guest speaker or activity regarding legislation
- Encourage members sign-up for legislator website newsletters
- Division email distribution list for sending legislation information and links to current information
- Provide division website links to their legislative representatives' website

Funding

- 10% or more of Budget for Legislation
- Financially support (partially or completely) member(s) to attend Advocacy Day or Lobby Day

Member Advocacy Activities

- Meeting Advocacy: Petitions, letters, postcard
- Member Advocacy via phone, email, letters or postcards

Advocacy with Legislators

- Advocacy Team visits local office in fall
- Additional local office visit(s) on current issues
- Member(s) attend local legislator function
- Participate in Sacramento Advocacy Day or Lobby Day locally or Washington DC

Building CalRTA Presence

- Invite a legislator or staff to local meeting, possibly present a certificate
- Send relevant newsletter(s) to legislator's office

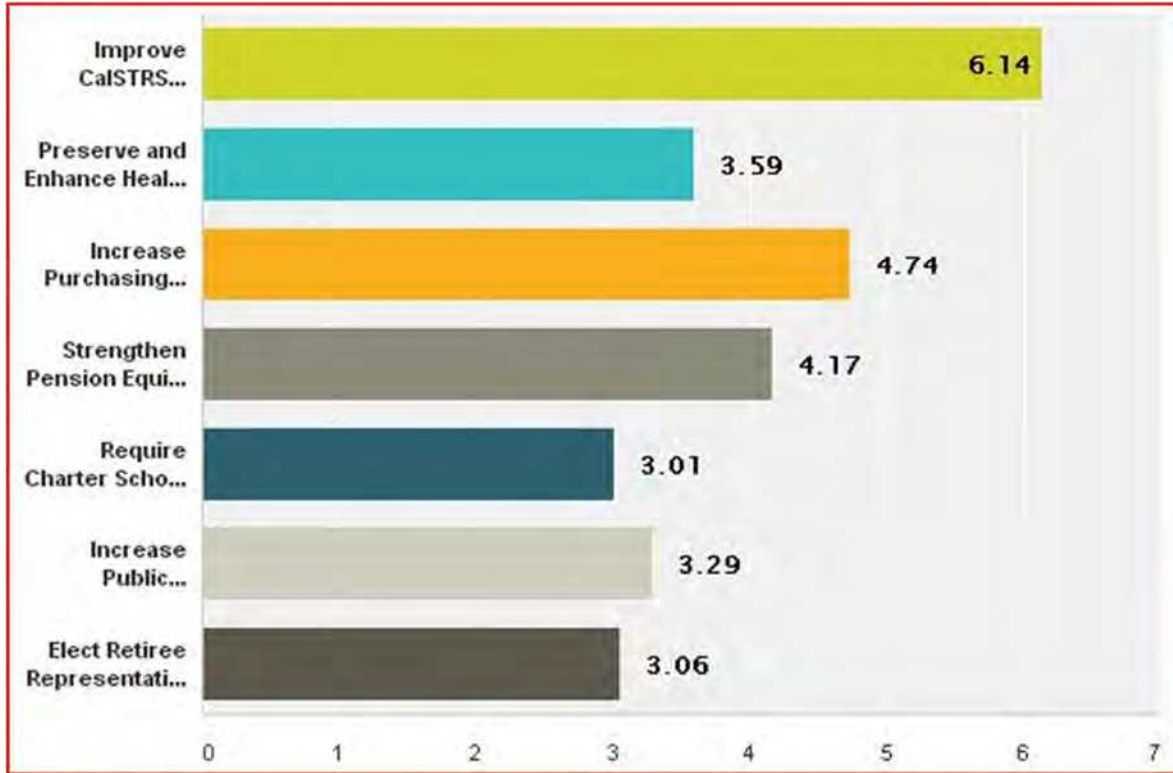
Division Legislation Chair Coordination

- Attends Area Fall Workshop break out session for advocacy planning
- Coordinates legislator visits with other divisions
- Collaborates with Area Legislation Chair

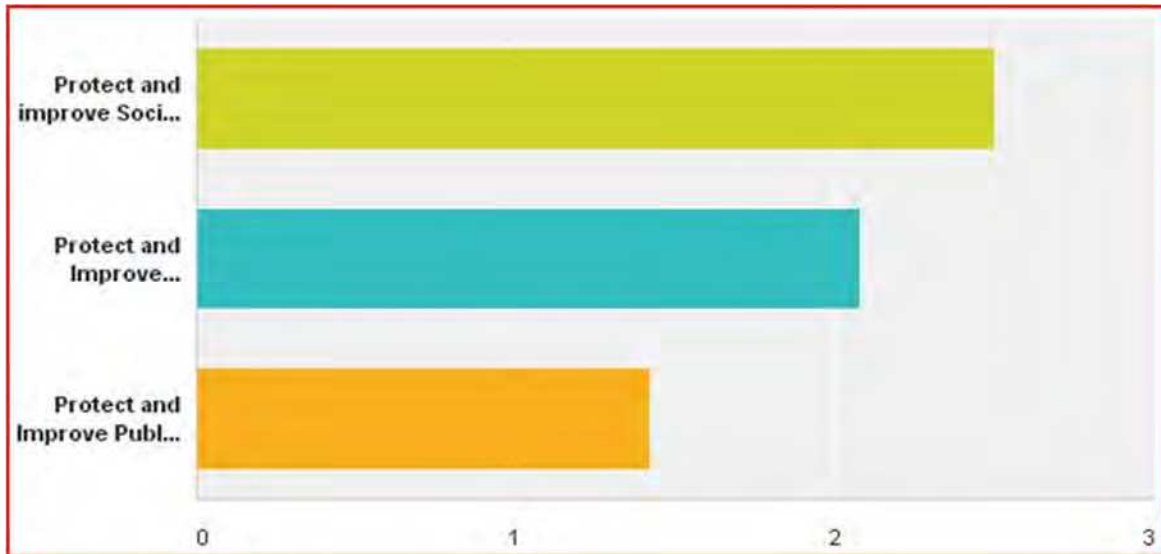
CalRTA Government Relations Committee Legislative Priority Survey

March 2014 Results - 138 Responders

STATE Priorities



FEDERAL Priorities



Government Relations Committee

March 2014

Committee Cycle Overview

Legislative Platform

- Foundation for Member Surveys, Action Plan & Priorities, and recommendations on Bills & initiatives
- Revisit bi-annually for currency of making recommendations for change when needed

Government Relations Priorities, Action Plan and Activities [two year process]

- Member Survey promotes member involvement [year long]
- Committee uses survey to create recommendation
- Board adopted, creates concepts for members to communicate CalRTA priorities (issues)

Division Support Planning

- Area Workshops include an hour breakout session
- Information & Input
 - Visits, presentations
 - Publications: Contact, Outreach, Connections
 - Area email distribution to Legislation Chair, Presidents, Newsletter

Division Advocacy Coordination

- Division annual fall meetings with local offices, placement on legislator local event list
- Advocacy Day and Lobby Day - March
 - Division budgets set by June
 - Fall Workshop determine Division Leads for Legislative Districts: Local and Washington DC
 - January – Divisions determine member to be Lead Contact for Local and Washington DC
 - February – appointments made coordinated with area chairs
- Additional strategic visits to promote bills as noted by CalRTA Advocate

Annual Reports– Successes of Division and Area Activities

- Division reports successes on an easy to use form with addition space for comments
- Area collates information for an Area report, in addition to Area Successes
- Results are tabulated in June for success from all Divisions and Areas
- Directors to receive reports for their area and for all areas

Appointments of committee members

- Collaborate with state chair and is knowledgeable of the responsibilities
- Need for internet access, email capabilities, and use of technology for communications
- Motivated for CalRTA advocacy

Friends of CalRTA, a current legislators and/ or public appointed continuator

- Recommended annually by committee vote – division nominations are due to area chair in January
- March recommendation to Board and presentation during May Conference

Legislative Cycle Overview

State Legislative Re-districting

- Every ten years, the Senate and Assembly Districts are redrawn based on the Census
- CalRTA Division(s) are identified with each legislative district

State Bills – Two year session

- Bills introduced – February
- CalRTA positions – March
- Bills amended are watched for CalRTA position updates
- CalRTA division and state advocacy as bills are in action position

State Initiatives – Ongoing

- Submission to Secretary of State to qualify for ballot measure: LAO, Collect Signatures
- CalRTA to take position on qualified initiatives
- CalRTA division and state advocacy on positioned initiatives

Congressional Sessions for Bills – Two year session

CalRTA Government Relations / Legislation Hand Book
Content 2st DRAFT – March 2014

Please send suggestions to the Government Relations Committee Members.

An overview, policies, information and innovation for CalRTA Legislation collaboration

- I. State and Area Structure
 - State Legislative Process
 - Legislative Advocate
 - State Legislation Chair
 - CalRTA Legislative Policies
 - Procedure for Adoption of Positions on Ballot Initiatives
 - Definitions of Positions on Legislation
 - Resources for information and current updates

- II. State Government Relations Committee
 - Reoccurring Cycle of Activities
 - Strategic planning to align with State planning
 - Collaborate with other committees
 - Communications to Board, Area, Divisions
 - Review Bills and Qualified Initiatives for recommendation to Board
 - Current with CalSTRS issues and public education
 - Legislation Action Plan and Member Survey
 - Friends of CalRTA Recognition Award
 - Advocacy Day / Lobby Day
 - Legislative Districts – constituent Divisions
 - Member input and proposals
 - Handbook and Platform Updates
 - Special Project or Task Force
 - Area Chair “Best Practices – Opportunities”
 - End of Year Success Report
 - Area Legislation Activities

- III. Division Legislation
 - Division Legislation Chairman “Best Practices – Opportunities”
 - Pension Education
 - Collaborate with other committees
 - Communications Network
 - Contacting a legislator
 - Outreach Possibilities
 - Campaign Assistance Guidelines
 - Meeting with Legislators and Staff
 - End of Year Success Report

Appendix

- Pension Education
- Glossary of Legislative Terms
- What you should know about Legislative Bills
- The State Budget
- STRS -- a brief description and Ed. Code re:Retirement References

CalRTA Division Legislation Successes [20__ End of Year Report] Revised 2013

Division Legislation Chair _____ Division _____ Area _____

[Division Chair: please send to Division President & Area Legislation Chair by May1]

Division Activities with Legislators [Mark "X" for successes]

- ___ Coordinate through Area Chair to establish Lead Legislator Contact for Advocacy Day
- ___ Connected with legislators/staff regarding CalRTA priorities
- ___ Attended local legislator functions: _____
- ___ Visited local legislator office
- ___ Legislator/Staff guest speaker/attend a division event
- ___ Presented a recognition to a legislator/staff

Members communicate with legislators [Mark "X" for successes]

- ___ Members attended Advocacy Day/Lobby Day (either local offices, capitol, or both)
- ___ Organized constituents to visit local legislator's office
- ___ Letter/card writing during meetings
- ___ Contact legislators Individually via email and/or phone calls

Division Chair Provides Member Support [Mark "X" for successes]

- ___ Sends legislation email information to members, about how many members? _____
- ___ Articles in every division newsletter
- ___ Pension Education Activities during division meetings
- ___ Reports during meetings

Member involvement opportunities [Mark "X" for successes]

- ___ Survey participation
- ___ Outreach to school staff members
- ___ Attends a Division Legislation Committee or meets with Division Legislation Chair
- ___ Participates in Pension Education, requests speakers: Area Chair, Speakers Bureau, etc.
- ___ Mentor members to serve as a future legislation chair

Division Chair Activities outside the division [Mark "X" for successes]

- ___ Attended the Area Workshop Legislation Session
- ___ Appearances at legislator events and/or other organizations
- ___ Joined other related organizations/coalitions
- ___ Outreach to local media and support Rapid Response Team with local Letters to the Editor
- ___ Other _____

Additional successes and information: _____

Suggestions to improve division support: _____

CalRTA Area Legislation Success Opportunities [EOY Report for 20__] Revised 2013

Area Legislation Chair _____ Area _____

[Area Chair please send to Area Director & State Legislation Chair with division collated successes, May]

Area Workshop(s): Fall ____ Additional _____

- Time provided to meet with Division Chairs ____ Division Chairs Attended _____ estimate %
- Time needed to meet with Division Chairs _____
- Time provided to speak to all workshop attendees, yes or no _____
- A Guest Speaker addressed legislation issues ____ Who? _____
- Possible topics covered adequately [Mark "X"]
 - ___ Advocacy Day preparation and coordination of Divisions' Contact Lead
 - ___ Division Budget at least 10% for Legislation Activities
 - ___ Strategies for meetings with legislators
 - ___ Methods to communicate with legislators with concerns and issues
 - ___ Information regarding bill / initiatives paths and timing for communications
 - ___ Current State and Federal Issues related to retirement security
 - ___ CalRTA Priorities and Survey participation
 - ___ Division Meetings: Pension Education, Guest Speakers, Legislation Updates, etc.
 - ___ Political Action Committee (PAC)
 - ___ Website resources, newsletter content, Rapid Response Team
 - ___ Review Legislation Handbook and CalRTA Platform
 - ___ Collect email addresses and/or develop phone tree for Information distribution
 - ___ Outreach to current teachers, organizations, and coalitions
 - ___ Other: _____

Support for Division Options [Mark "X"]

- ___ Send eMail information to Division Legislation Chairs and Presidents
- ___ Postal mail information to Division Legislation Chairs without email
- ___ Phone call to keep in touch and provide support
- ___ Visit and/or invited as speaker during division meetings
- ___ Serve as an informational resource for divisions
- ___ Promote exchange of information and strategies between divisions
- ___ Other: _____

State Committee Meetings

Successes _____

Improvements _____

Additional successes and information: _____

Suggestions to improve area support: _____



EXPENSE CLAIM

Name: _____	Claim Number: _____ (Office use only)
Address: _____ _____ _____	CalRTA Position: _____
	Telephone: _____
	Email: _____
Activity: _____ _____	Location: _____

Date	Airfare / Train	Shuttle / Taxi	Mileage	Tolls	Parking	Lodging	Breakfast	Lunch	Dinner	Other Tips	Misc Expenses	Misc Exp. Notes
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
	\$	\$	mi	\$	\$	\$	\$	\$	\$	\$	\$	
Totals:	\$	\$	mi x 50¢ / mile \$	\$	\$	\$	\$	\$	\$	\$	\$	
TOTAL EXPENSES: \$ _____												

_____	_____	_____	_____
Claimant Signature	Date	Approval Signature	Date

FOR OFFICE USE ONLY		
Account #	Notation	Amount

ADVOCACY DAY SCHEDULE OF EVENTS

Monday, March 17, 2014

6 - 7 p.m.	Briefing for those with early morning Legislator Appointments on Tuesday (will include opportunity to register and pick up legislator packets)	Hyatt Regency Hotel Golden State A & B Foyer Second Floor
------------	---	---

Tuesday, March 18, 2014

7 - 11:30 a.m.	Advocacy Day Registration Legislator Packet Pickup**	Hyatt Regency - Ballroom lobby Hyatt Regency - Ballroom lobby
8:30 - 9:30 a.m.	Breakfast / Briefing #2	Hyatt Regency Regency Ballroom
8 a.m. – 11 a.m	Hospitality Room groups who wish to caucus before appointments may use this room. Light refreshments are available.	State Capitol Building Basement
2 p.m. – 5 p.m.	Optional De-Briefing	Hyatt Regency Ventura Room, Second Floor

LUNCH IS ON YOUR OWN – THERE ARE MAPS WITH LOCAL RESTAURANTS AVAILABLE AT REGISTRATION. THERE IS ALSO A CAFETERIA IN THE BASEMENT OF THE CAPITOL. DUE TO THE PROXIMITY OF THE CAPITOL BUILDING WE ARE NOT PROVIDING SHUTTLE SERVICE TO THE CAPITOL. TAXIS ARE AVAILABLE FOR ATTENDEES WITH MOBILITY CHALLENGES AT THE ATTENDEES COST.

**** It is extremely important that you identify your LEAD person for each legislator when supplying your appointment confirmation to your Area Government Relations Representative – Legislator packets will only be released to identified LEAD members.**



BASIC DOs and DON'Ts of LOBBYING

Be Prepared

The emotional impact of your personal story is very powerful.
Choose a story that will illustrate one of the main points of your visit.

Give anecdotes and specific examples pertinent to your life.

Be Honest

Do not guess or make up an answer.
Do not hesitate to say: "I don't know, but I can get that information for you."

Know the basics. Don't worry that you're not an expert. You don't need to be.
Your job is to put a face on the decision.

Be Brief

State your views concisely and clearly.
Legislators may have only a few minutes to meet with you, so be prepared and succinct.

Stay on message. Legislators will try to change the discussion, often by asking you technical questions. Your job is to turn the conversation back to your topic.

Do not overkill. Recognize when you've received what you came for. Do not ramble.

Be Respectful and Polite

Always address legislators properly (Assemblyman/woman or Senator). State points of disagreements in a straightforward way, then go back to your message.

More Tips:

Breathe: Take a few deep breaths before meetings. Just be yourself!

Be Reliable: When you make an appointment with a legislator, keep it. Be punctual. If you need to cancel an appointment, call the legislator's office as soon as possible. When you tell a member you will send information, do so promptly.

Select a Spokesperson and Assign Roles: Appoint a member of your group to introduce everyone and make the three main points of your visit. Plan which members of the group will highlight each talking point then role play your points prior to each meeting to keep them brief. The spokesperson should reiterate the main points at the end of meeting.

Don't Be Timid or Awestruck: These are your elected representatives, who also happen to be human. As a constituent, you shouldn't allow a legislator to dominate the conversation or give speeches. Courteously, but forcefully, make your points and ask your questions. Try to get the legislator back on point.

End Your Visit with a Question: Ask for support, which many constituents fail to do.

Leave Something Tangible: A fact sheet or a copy of a bill (if applicable) — anything that visually will remind your legislator of your visit and your position on an issue.

Debrief and Follow-Up: Immediately following the meeting, members of your group should review their notes to be certain everyone knows: (1) what was said; (2) what was promised by all parties; and (3) what next steps are needed to gain (or maintain) the legislator's support. Honestly evaluate the group's performance before your next meeting, to identify your collective strengths and weaknesses. Your efforts should be coordinated so promises made (i.e. sending more information, attending a district office meeting, etc.) are fulfilled in a timely manner.

Thank You Letter: Send a thank you letter that (1) expresses your appreciation for the visit; (2) summarizes the purpose of the visit; and (3) reiterates the action you want taken by the legislator. The letter should be handwritten or typed (no photocopied form letters!), and mailed within a few days of the meeting.

Reprinted with permission from the Retirement Coalition



CalRTA Advocacy Day Talking Points

March 2014

CalSTRS Benefits

People become educators to help California's youth, not to get rich. They retire with a modest CalSTRS benefit based on age, years of service and final compensation. For most retired educators, that CalSTRS benefit is a cornerstone of retirement security and remaining self sufficient later in life.

- CalSTRS benefits were reduced even before the passage of the Public Employees Pension Reform Act (PEPRA). The reductions ended future earning of the longevity factors, transfers to the Defined Benefit Supplemental account and 10 percent of benefit value as a lump sum distribution.
- A CalSTRS pension does not include Social Security. In fact, educators who have paid into and earned Social Security before joining CalSTRS face reductions to their Social Security benefit and are at risk of losing both the spousal benefit and the death benefit earned by their Social Security eligible spouse. These penalties are called the Government Pension Offset and the Windfall Elimination Provision.
- CalSTRS does not have a retiree health care benefit.
- Fewer and fewer school employers provide retirees with district supported retiree health benefits.

CalSTRS Unfunded Obligation

The unfunded obligation was created by the state taking a partial pension contribution holiday; diversion of a portion of employee contributions into a separate account and the unprecedented financial meltdown caused by risky Wall Street business practices.

- The \$71 billion unfunded obligation is for member services already performed. The normal cost contributions are expected to meet future service earned.
- PEPRA will protect against future unfunded obligations.
- The CalSTRS options identified in the Senate Concurrent Resolution report provide a roadmap for resolving the unfunded obligation and achieving funding sustainability.

Legislative Action

CalRTA applauds the recent announcement that the Legislature is going to address CalSTRS's unfunded obligation. A secure retirement is an important recruitment tool to attract the best teachers for California's youth.

- CalRTA supports Governor Jerry Brown, the Legislature, educators and their employers as they begin exploring options to achieve long-term sustainable funding.
- CalRTA appreciates Speaker Pérez and Assembly Member Bonta initiating the process to amend Assembly Bill 611 (Bonta) to provide CalSTRS full funding.
- CalRTA asks all legislators to support this effort and the full funding needed to eliminate CalSTRS's unfunded obligation.

California State Teachers' Retirement System Defined Benefit Program – 2012 Actuarial Valuation

Appendix D - Glossary



The following definitions are largely excerpts from a list adopted by the major actuarial organizations in the United States. In some cases, the definitions have been modified for specific applicability to the CalSTRS DB Program. Defined terms are capitalized throughout this Appendix.

Actuarial Assumptions	Assumptions as to the occurrence of future events affecting pension costs, such as mortality, withdrawal, disablement and retirement, changes in compensation, rates of investment earnings and asset appreciation or depreciation, and procedures used to determine other relevant items.
Actuarial Cost Method	A procedure for determining the Actuarial Present Value of pension plan benefits and expenses and for developing an actuarially equivalent allocation of such value to time periods, usually in the form of a Normal Cost and an Actuarial Obligation.
Actuarial Equivalent	Of equal Actuarial Present Value, determined as of a given date with each value based on the same set of Actuarial Assumptions.
Actuarial Gain or Loss	A measure of the difference between actual experience and that expected based upon a set of Actuarial Assumptions during the period between two actuarial valuation dates, as determined in accordance with a particular Actuarial Cost Method.
Actuarial Obligation	That portion, as determined by a particular Actuarial Cost Method, of the Actuarial Present Value of pension plan benefits and expenses which is not provided for by future Normal Costs.
Actuarial Present Value	The value of an amount or series of amounts payable or receivable at various times, determined as of a given date by the application of a particular set of Actuarial Assumptions.
Actuarial Surplus	The excess, if any, of the Actuarial Value of Assets over the Actuarial Obligation.
Actuarial Valuation	The determination, as of a Valuation Date, of the Normal Cost, Actuarial Obligation, Actuarial Value of Assets and related Actuarial Present Values for a pension plan.
Actuarial Value of Assets	The value of cash, investments and other property belonging to a pension plan, as used by the actuary for the purpose of an actuarial valuation.
Additional Revenue Needed	The percentage of valuation year Earned Salaries needed, in addition to all currently scheduled contributions (including scheduled increases in the State supplemental contributions

**California State Teachers' Retirement System
Defined Benefit Program – 2012 Actuarial Valuation**

under EC 22955b), in order to amortize the Unfunded Actuarial Obligation over a 30-year period, assuming all actuarial assumptions are met in the future. Assumes increase in contribution rate begins on valuation date.

Beginning with the June 30, 2012 actuarial valuation, this number takes into account the projected impact of AB 340 on the Normal Cost rate of members hired on or after January 1, 2013.

Entry Age Cost Method

An Actuarial Cost Method under which the Actuarial Present Value of Projected Benefits of each individual included in an actuarial valuation is allocated on a level basis over the earnings of the individual between entry age and assumed exit ages. The portion of this Actuarial Present Value allocated to a valuation year is called the Normal Cost. The portion of this Actuarial Present Value not provided for at a Valuation Date by the Actuarial Present Value of future Normal Costs is called the Actuarial Obligation.

Normal Cost

The portion of the Actuarial Present Value of Projected Benefits which is allocated to a valuation year by the Actuarial Cost Method.

Smoothing

Smoothing is an averaging process that spreads gains and losses over a period of time, which for the Defined Benefit Program is three years. It is used in calculating CalSTRS Actuarial Valuation and allows CalSTRS to determine the long-term ability to cover benefits already earned by members. Smoothing is a standard practice that meets the Government Accounting Standards Board's rules governing public pension funds.

Unfunded Actuarial Obligation

The excess, if any, of the Actuarial Obligation over the Actuarial Value of Assets.

Valuation Date

June 30, 2012.

Long Term Care Policy SURVEY

1. The CalRTA Board appreciates your participation in this survey. The information collected will assist in providing support. There may be 3 to 9 questions to answer,

Answer Options	Response Percent	Response Count
Member of CalRTA	88.8%	111
Non-member of CalRTA	11.2%	14
<i>answered question</i>		125
<i>skipped question</i>		0

3. 1. Are you currently covered by a Long Term Care policy?

Answer Options	Response Percent	Response Count
Yes	77.2%	78
No	22.8%	23
<i>answered question</i>		101
<i>skipped question</i>		24

4. 1.a. Did you previously have a Long Term care policy that you ended?

Answer Options	Response Percent	Response Count
Yes	4.3%	1
No	95.7%	22
<i>answered question</i>		23
<i>skipped question</i>		102

5. 1.b. Are you considering purchasing a Long Term Care policy?

Answer Options	Response Percent	Response Count
Yes	40.0%	8
No	60.0%	12
<i>answered question</i>		20
<i>skipped question</i>		105

6. 2. Is the policy provided by the California Public Employees Retirement System (CalPERS)?

Answer Options	Response Percent	Response Count
Yes	70.9%	61
No	29.1%	25

<i>answered question</i>	86
<i>skipped question</i>	39

7. 3. Does the policy contain an inflation protection provision that increases the benefit each year?

Answer Options	Response Percent	Response Count
Yes	75.0%	45
No	25.0%	15
<i>answered question</i>		60
<i>skipped question</i>		65

8. 4. Did you change from a policy with inflation protection to one without that protection?

Answer Options	Response Percent	Response Count
Yes	35.7%	5
No	64.3%	9
<i>answered question</i>		14
<i>skipped question</i>		111

9. 5. Do you intend to continue the inflation protection when the 85% premium increase happens in July 2015?

Answer Options	Response Percent	Response Count
Yes	50.0%	21
No	50.0%	21
<i>answered question</i>		42
<i>skipped question</i>		83

10. 6. Would you consider continuing the inflation protection if the premium increase is significantly less than 85%?

Answer Options	Response Percent	Response Count
Yes	87.0%	20
No	13.0%	3
<i>answered question</i>		23
<i>skipped question</i>		102

11. As a non-member, what is your status?

Answer Options	Response Percent	Response Count
Employed teacher/educator	40.0%	4
Retired teacher/educator	60.0%	6

Other (please specify)	3
<i>answered question</i>	10
<i>skipped question</i>	115

12. 1. Are you currently covered by a Long Term Care policy?

Answer Options	Response Percent	Response Count
Yes	46.7%	7
No	53.3%	8
<i>answered question</i>		15
<i>skipped question</i>		110

13. 1.a. Did you previously have a Long Term care policy that you ended?

Answer Options	Response Percent	Response Count
Yes	0.0%	0
No	100.0%	8
<i>answered question</i>		8
<i>skipped question</i>		117

14. 1.b. Are you considering purchasing a Long Term Care policy?

Answer Options	Response Percent	Response Count
Yes	75.0%	6
No	25.0%	2
<i>answered question</i>		8
<i>skipped question</i>		117

15. 2. Is the policy provided by the California Public Employees Retirement System (CalPERS)?

Answer Options	Response Percent	Response Count
Yes	54.5%	6
No	45.5%	5
<i>answered question</i>		11
<i>skipped question</i>		114

16. 3. Does the policy contain an inflation protection provision that increases the benefit each year?

Answer Options	Response Percent	Response Count
Yes	100.0%	6

No	0.0%	0
<i>answered question</i>		6
<i>skipped question</i>		119

17. 4. Did you change from a policy with inflation protection to one without that protection?

Answer Options	Response Percent	Response Count
Yes	0.0%	0
No	0.0%	0
<i>answered question</i>		0
<i>skipped question</i>		125

18. 5. Do you intend to continue the inflation protection when the 85% premium increase happens in July 2015?

Answer Options	Response Percent	Response Count
Yes	33.3%	2
No	66.7%	4
<i>answered question</i>		6
<i>skipped question</i>		119

19. 6. Would you consider continuing the inflation protection if the premium increase is significantly less than 85%?

Answer Options	Response Percent	Response Count
Yes	100.0%	4
No	0.0%	0
<i>answered question</i>		4
<i>skipped question</i>		121

20. Your time and responses are very much appreciated! Optional: Send a comment:

Answer Options	Response Count
	54
<i>answered question</i>	54
<i>skipped question</i>	71

Initiatives and Referenda Cleared for Circulation

The Attorney General prepares a title and summary of the chief purpose and points of an initiative. Initiatives are cleared for circulation on the day the title and summary is sent to the initiative proponent(s). No petition may be circulated for signatures before it has been cleared to do so by the Attorney General.

1649. (13-0064)

In-Home Care Providers. Expenditures. Initiative Statute.

Summary Date: 02/19/14 | Circulation Deadline: 07/21/14 | Signatures Required: 504,760

Brandi Wolf c/o Lance H. Olson (916) 442-2952

Requires businesses providing in-home care services to spend at least 75% of their total annual home care service revenue on direct patient care. Limits administrative expenses, management compensation, and profit distributions collectively to 25% of revenue. Establishes state program to administer and enforce measure, provider fees, and fines up to \$10,000 per year plus mandatory license revocation for violations. Dedicates fees and fines to fund program. Requires providers to prepare annual reports showing revenue and expenditures. Requires publication of these reports and information on provider violations. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **State administrative costs of between \$8 million and \$11 million annually, with the authority to fully recover these costs from fees levied on certain home care organizations.** (13-0064.)

1647. (13-0062)

School Teachers. Performance-Based Layoffs and Rehiring. Dismissals. Initiative Statute.

Summary Date: 02/14/14 | Circulation Deadline: 07/14/14 | Signatures Required: 504,760

Matt David c/o Kurt Oneto (916) 446-6752

Requires school districts to use a classroom teacher's performance ratings, rather than seniority, to determine layoffs and make rehiring decisions. Requires districts to conduct specified evaluations of each teacher's performance annually. Requires these annual evaluations to measure teacher performance by, at a minimum, student academic progress, classroom observations and instructional practices, parent and student feedback, and teacher partnerships with community members and organizations. Provides that teachers convicted of certain violent,

serious, or sexual felonies are to be automatically dismissed and permanently barred from employment as a teacher in the state. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Costs ranging from several hundreds of millions of dollars to over \$1 billion annually in the initial three years for school districts to conduct more frequent and intensive teacher evaluations, with annual costs dropping to between one-third and one-half in subsequent years. One-time costs in the tens of millions of dollars to in excess of \$100 million for school districts to create new teacher evaluation systems, with ongoing annual costs to manage the new systems of tens of millions of dollars.** (13-0062.)

1646. (13-0058)

School Teachers. Performance-Based Layoffs. Dismissals. Initiative Statute.

Summary Date: 02/14/14 | Circulation Deadline: 07/14/14 | Signatures Required: 504,760

Matt David c/o Kurt Oneto (916) 446-6752

Requires school districts to use a classroom teacher's performance ratings, rather than seniority, to determine layoffs. Requires districts to conduct specified evaluations of each teacher's performance annually. Requires these annual evaluations to measure teacher performance by, at a minimum, student academic progress, classroom observations and instructional practices, parent and student feedback, and teacher partnerships with community members and organizations. Provides that teachers convicted of certain violent, serious, or sexual felonies are to be automatically dismissed and permanently barred from employment as a teacher in the state. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Costs ranging from several hundreds of millions of dollars to over \$1 billion annually in the initial three years for school districts to conduct more frequent and intensive teacher evaluations, with annual costs dropping to between one-third and one-half in subsequent years. One-time costs in the tens of millions of dollars to in excess of \$100 million for school districts to create new teacher evaluation systems, with ongoing annual costs to manage the new systems of tens of millions of dollars.** (13-0058.)

1644. (13-0059)

Low-Performing Schools. Intern Teachers. Charter School Administrators. Initiative Statute.

Summary Date: 02/14/14 | Circulation Deadline: 07/14/14 | Signatures Required: 504,760

Thomas A Willis c/o Karen Getman (510) 346-6200

Bars use of intern teachers at a public school, including a charter school, if the school has had low academic performance rankings within the past two years. Bars charter school use of administrators who do not have a teaching or school services credential, if the school has had low academic performance rankings within the past two years. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Annual costs up to the low tens of millions of dollars statewide for schools to replace many (but likely not all) interns with fully credentialed teachers.** (13-0059.)

1641. (13-0057)

Charter Schools. Public Records. Open Meetings. Conflicts of Interest. Initiative Statute.

Summary Date: 02/07/14 | Circulation Deadline: 07/07/14 | Signatures Required: 504,760

Thomas A. Willis c/o Karen Getman (510) 346-6200

Requires charter schools and related entities to comply with state laws providing for public records upon request, providing for public access to meetings, and governing financial conflicts of interest. Requires public disclosures before charter school approval of certain contracts over \$10,000. Prohibits for-profit operation of charter schools. Restricts charter school investment of public funds to government bonds and federally insured accounts. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Costs to charter schools, of at least several million dollars annually statewide, to undertake additional legal, financial, and disclosure-related work. Minor annual costs to school districts, county offices of education, and two state agencies to provide additional oversight and assistance to charter schools.** (13-0057.)

1640. (13-0056)

Charter Schools. Public Records. Open Meetings. Conflicts of Interest. Initiative Statute.

Summary Date: 02/07/14 | Circulation Deadline: 07/07/14 | Signatures Required: 504,760

Thomas A. Willis c/o Karen Getman (510) 346-6200

Requires charter schools and related entities to comply with state laws providing for public records upon request, providing for public access to meetings, and governing financial conflicts of interest. Requires public disclosures before charter school approval of certain contracts over

\$10,000. Prohibits for-profit operation of charter schools. Restricts charter school investment of public funds to government bonds and federally insured accounts. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Costs to charter schools, of at least several million dollars annually statewide, to undertake additional legal, financial, and disclosure-related work. Minor annual costs to school districts, county offices of education, and two state agencies to provide additional oversight and assistance to charter schools.** (13-0056.)

1635. (13-0047, Amdt. #2S)

School Funding. Property Tax Revenues. Initiative Constitutional and Statutory Amendment.

Summary Date: 01/31/14 | Circulation Deadline: 06/30/14 | Signatures Required: 807,615

Katherine G. Welch and Jennifer L. Bestor (510) 500-5147

Prohibits state from redirecting or reducing the allocation of local property tax revenues designated for K-12 public schools and community college districts. Requires state to use its general fund instead of these local property tax revenues to compensate cities and counties for their reduced vehicle license fee revenue when the fee is set below 2 percent of vehicle market value. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Net decrease in city and county revenue of about \$2.5 billion per year, beginning in 2015-16. Uncertain impact on annual state costs ranging from savings of a few billion dollars to costs of a few billion dollars, beginning in 2015-16. Possible increase in school and community college funding.** (13-0047.)

1630. (13-0043)

Public Employees. Pension and Retiree Healthcare Benefits. Initiative Constitutional Amendment.

Summary Date: 01/06/14 | Circulation Deadline: 06/05/14 | Signatures Required: 807,615

Chuck Reed, William R. Kampe, Tom Tait, Patrick J. Morris, and Stephanie Gomes c/o James R. Sutton (415) 732-7700

Eliminates constitutional protections for vested pension and retiree healthcare benefits for current public employees, including teachers, nurses, and peace officers, for future work performed. Permits government employers to reduce employee benefits and increase employee

contributions for future work if retirement plans are substantially underfunded or government employer declares fiscal emergency. Requires government employers whose pension or retiree healthcare plans are less than 80 percent funded to prepare a stabilization report specifying non-binding actions designed to achieve 100 percent funding within 15 years. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Potential net reduction of hundreds of millions to billions of dollars per year in state and local government costs. Net savings-emerging over time-would depend on how much governments reduce retirement benefits and increase salary and other benefits. Increased annual costs-potentially in the hundreds of millions to billions of dollars-over the next two decades for those state and local governments choosing to increase contributions for unfunded liabilities, more than offset by retirement cost savings in future decades. Increased annual costs to state and local governments to develop retirement system funding reports and to modify procedures and information technology. Costs could exceed tens of millions of dollars initially, but would decline in future years.** (13-0043.)

1621. (13-0034)

State School Funding. Timing of Distributions to Schools. Initiative Statute.

Summary Date: 12/26/13 | Circulation Deadline: 05/27/14 | Signatures Required: 504,760

Suzanne Cordingley info@fundcalschools.org

Amends the statutory scheme authorizing distribution and governing timing of payments from the State School Fund, the primary source of annual state funding for schools. Beginning July 1, 2015, requires a three-fourths majority vote of the Legislature to defer payments to schools for more than 30 days, or to amend the statutory scheme in any other way aside from moving up the timing of distributions. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **One-time state costs in 2015-16 of up to \$5.6 billion to eliminate all existing school payment deferrals. Beginning in 2015-16, more predictable cash flow for schools and lower school borrowing costs. In future years, reduced state flexibility to respond to cash or budgetary problems.** (13-0034.)

1616. (13-0032)

School Employees. Dismissal or Suspension for Egregious Misconduct. Initiative Statute.

Summary Date: 12/20/13 | Circulation Deadline: 05/19/14 | Signatures Required: 504,760

Ashlee N. Titus (916) 442-7757

Speeds process and eliminates 4-year statute of limitations to dismiss or suspend school employees accused of egregious misconduct, defined to include child abuse, sexual abuse of minors, sexual assault on minors or adults, and certain drug offenses. Prevents agreements to remove evidence of egregious misconduct from employee's personnel records or not report employee's misconduct to law enforcement or teacher credentialing officials. If employee is dismissed, allows school districts to recover salary paid and disallow retirement service credit earned during proceedings, starting 30 days after written notice of dismissal. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **Minor net annual effect on the state, as small additional administrative costs would be offset by small savings related to dismissal hearings and retirement credit. Small annual savings to school districts because of reduced legal expenses, wages, and pension costs.** (13-0032.)

1612. (13-0021)

State School Funding. Timing of Distributions to Schools. Initiative Statute.

Summary Date: 12/02/13 | Circulation Deadline: 05/01/14 | Signatures Required: 504,760

Suzanne Cordingley info@fundcalschools.org

Repeals, and re-enacts effective July 1, 2015, the state statute authorizing distribution and governing timing of payments from the State School Fund, the primary source of annual state funding for schools. Requires a three-fourths majority vote of the Legislature to defer payments to schools, or to amend the statute in any other way aside from moving up the timing of distributions. Summary of estimate by Legislative Analyst and Director of Finance of fiscal impact on state and local government: **One-time state costs in 2015-16 of up to \$5.6 billion to eliminate all existing school payment deferrals. Beginning in 2015-16, more predictable cash flow for schools and lower school borrowing costs. In future years, reduced state flexibility to respond to cash or budgetary problems.** (13-0021.)

ULTRA-DEEPWATER AND UNCONVENTIONAL NATURAL GAS AND OTHER
PETROLEUM RESEARCH FUND—Continued
Employment Summary

Identification code 89-5523-0-2-271	2013 actual	2014 est.	2015 est.
1001 Direct civilian full-time equivalent employment	3		

ELK HILLS SCHOOL LANDS FUND

For necessary expenses in fulfilling the final payment under the Settlement Agreement entered into by the United States and the State of California on October 11, 1996, as authorized by section 3415 of Public Law 104-106, \$15,579,815, for payment to the State of California for the State Teachers' Retirement Fund, of which \$15,579,815 will be derived from the Elk Hills School Lands Fund.

Special and Trust Fund Receipts (in millions of dollars)

Identification code 89-5428-0-2-271	2013 actual	2014 est.	2015 est.
0100 Balance, start of year	15	15	31
Receipts:			
0220 Elk Hills School Lands Fund		16	
0400 Total: Balances and collections	15	31	31
Appropriations:			
0500 Elk Hills School Lands Fund			-16
0799 Balance, end of year	15	31	15

Program and Financing (in millions of dollars)

Identification code 89-5428-0-2-271	2013 actual	2014 est.	2015 est.
Obligations by program activity:			
0001 Direct program activity			16
0900 Total new obligations (object class 41.0)			16
Budgetary Resources:			
Budget authority:			
Appropriations, discretionary:			
1101 Appropriation (special or trust fund)			16
1160 Appropriation, discretionary (total)			16
1930 Total budgetary resources available			16
Change in obligated balance:			
Unpaid obligations:			
3010 Obligations incurred, unexpired accounts			16
3020 Outlays (gross)			-16
Budget authority and outlays, net:			
Discretionary:			
4000 Budget authority, gross			16
Outlays, gross:			
4010 Outlays from new discretionary authority			16
4180 Budget authority, net (total)			16
4190 Outlays, net (total)			16

Title XXXIV, Subtitle B of Public Law 104-106 required the Department to sell the government's interest in Naval Petroleum Reserve No. 1 (NPR-1; Elk Hills) pursuant to the terms of the Act. The sale occurred in February 1998. Section 3415 of the Act required, among other things, that the Department make an offer of settlement based on the fair value of the State of California's longstanding claims to two parcels of land ("school lands") within the Reserve. Under the Act, nine percent of the net proceeds were reserved in a contingent fund in the Treasury for payment to the State. In compliance with the Act and in order to remove any cloud over title which could diminish the sales value of the Reserve, the Department entered into a settlement agreement with the State on October 11, 1996, in which the Department agreed to compensate the State of California for its claim of title to two sections of land with NPR-1. The "Settlement Agreement" stipu-

lates installments reserved by the Act will be paid to the State. Installments totaling \$299,520,000 have been paid to date. On April 21, 2011 the Department settled NPR-1 final equity with Chevron. Under the terms of the settlement, Chevron paid \$108,000,000 to the United States. That, in turn, increased the net proceeds of the sale. On August 3, 2011, the Department and the State agreed on the final payment of \$15,579,815 with respect to the longstanding claim on the two sections of land.

PAYMENTS TO STATES UNDER FEDERAL POWER ACT

Special and Trust Fund Receipts (in millions of dollars)

Identification code 89-5105-0-2-806	2013 actual	2014 est.	2015 est.
0100 Balance, start of year			
Receipts:			
0200 Licenses under Federal Power Act from Public Lands and National Forests, Payment to States (37 1/2%)	3	4	5
0400 Total: Balances and collections	3	4	5
Appropriations:			
0500 Payments to States under Federal Power Act	-3	-4	-5
0799 Balance, end of year			

Program and Financing (in millions of dollars)

Identification code 89-5105-0-2-806	2013 actual	2014 est.	2015 est.
Obligations by program activity:			
0001 Direct program activity	3	4	5
0900 Total new obligations (object class 41.0)	3	4	5
Budgetary Resources:			
Budget authority:			
Appropriations, mandatory:			
1201 Appropriation (special or trust fund)	3	4	5
1260 Appropriations, mandatory (total)	3	4	5
1930 Total budgetary resources available	3	4	5
Change in obligated balance:			
Unpaid obligations:			
3000 Unpaid obligations, brought forward, Oct 1		3	
3010 Obligations incurred, unexpired accounts	3	4	5
3020 Outlays (gross)		-7	-5
3050 Unpaid obligations, end of year	3		
Memorandum (non-add) entries:			
3100 Obligated balance, start of year		3	
3200 Obligated balance, end of year	3		
Budget authority and outlays, net:			
Mandatory:			
4090 Budget authority, gross	3	4	5
Outlays, gross:			
4100 Outlays from new mandatory authority		4	5
4101 Outlays from mandatory balances		3	
4110 Outlays, gross (total)		7	5
4180 Budget authority, net (total)	3	4	5
4190 Outlays, net (total)		7	5

The States are paid 37.5 percent of the receipts from licenses for occupancy and use of national forests and public lands within their boundaries issued by the Federal Energy Regulatory Commission (16 U.S.C. 810).

NORTHEAST HOME HEATING OIL RESERVE

For necessary expenses for Northeast Home Heating Oil Reserve storage, operation, and management activities pursuant to the Energy Policy and Conservation Act (42 U.S.C. 6201 et seq.), **[\$8,000,000]** \$1,600,000, to remain available until expended. (Energy and Water Development and Related Agencies Appropriations Act, 2014.)

**DEFINITIONS OF POSITIONS ON LEGISLATION
AS RECOMMENDED BY GOVERNMENT RELATIONS COMMITTEE
(DRAFT for Handbook)**

Sponsor

CalRTA develops the legislation and has it introduced by a member of the Legislature. Working for its passage is given major emphasis.

Co-Sponsor

CalRTA works cooperatively with one or more other groups to develop, introduce and seek passage of a proposal.

Support

CalRTA does not introduce the proposal but supports it in every way possible.

Approve

CalRTA wishes the bill to pass but will not work for its enactment at the expense of more important legislation.

Oppose

CalRTA gives major emphasis to the defeat of the proposed legislation.

Disapprove

CalRTA does not wish such legislation to pass but will not work for its defeat at the expense of more important legislation.

Support/Oppose If Amended

“If Amended” and “Unless Amended” positions can be adopted to modify the positions identified above. The use of “If Amended” and “Unless Amended” provide direction to the Legislative Advocate and CalRTA members regarding options/alternatives the Board of Directors believe would be appropriate for changes to the legislation.

Neutral

The legislation has been considered by an appropriate CalRTA committee with the resulting decision that CalRTA will take no official position on the proposal at this time.

Watch

“Watch” is a default reference to track bills that do not have an adopted position, but could be considered for a position at a future date. This reference means CalRTA will keep track of the bill because it might be amended to affect CalSTRS or become significant for CalRTA.

CalRTA Bills for Review

2/18/2014

[AB 1534](#) ([Linder R](#)) **Area agencies on aging: independent living centers: funding.**

Current Text: Introduced: 1/21/2014 [pdf](#) [html](#)

Introduced: 1/21/2014

Status: 1/30/2014-Referred to Coms. on AGING & L.T.C. and HUM. S.

Location: 1/30/2014-A. AGING & L.T.C.

Calendar: 3/4/2014 2 p.m. - State Capitol, Room 127 ASSEMBLY AGING AND LONG-TERM CARE, YAMADA, Chair

Summary: Would continuously appropriate from the Federal Trust Fund, in the absence of enactment of the annual Budget Act by July 1 of a fiscal year, (1) to the California Department of Aging, the amount of federal funds contained in the Federal Trust Fund necessary to pay area agencies on aging for the administration of programs under their jurisdiction, and (2) to the Department of Rehabilitation, the amount of federal funds contained in the Federal Trust Fund necessary to pay independent living centers for the administration of programs under their jurisdiction, pending enactment of the Budget Act. This bill contains other related provisions and other existing laws.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1552](#) ([Lowenthal D](#)) **Community-based adult services: adult day health care centers.**

Current Text: Introduced: 1/27/2014 [pdf](#) [html](#)

Introduced: 1/27/2014

Status: 2/6/2014-Referred to Coms. on HEALTH and AGING & L.T.C.

Location: 2/6/2014-A. HEALTH

Summary: Would establish the Community-Based Adult Services (CBAS) program, as a Medi-Cal benefit. The bill would require that CBAS be provided and available at licensed ADHC centers that are certified by the California Department of Aging as CBAS providers. The bill would require CBAS providers to meet specified licensing requirements and to provide care in accordance with specified regulations. This bill contains other related provisions.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1553](#) ([Yamada D](#)) **Long-term care insurance: premium basis.**

Current Text: Introduced: 1/27/2014 [pdf](#) [html](#)

Introduced: 1/27/2014

Status: 2/6/2014-Referred to Com. on INS.

Location: 2/6/2014-A. INS.

Summary: Would prohibit a long-term care insurance policy issued, amended, or renewed on or after January 1, 2015, from charging a different premium, price, or charge based on the sex of the contracting party, potential contracting party, or a person reasonably expected to benefit from the policy. The term "sex" would be defined for these purposes to mean a person's gender, gender identity, and gender expression, as defined.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1554](#) (Skinner D) Long-term care facilities: residential care facilities for the elderly.

Current Text: Introduced: 1/ 27/ 2014 [pdf](#) [html](#)

Introduced: 1/ 27/ 2014

Status: 2/ 14/ 2014- Referred to Coms. on HUM. S. and AGING & L.T.C.

Location: 2/ 14/ 2014-A. HUM. S.

Summary: Would specify that certain disclosure provisions of the Long-Term Care, Health, Safety, and Security Act of 1973 apply notwithstanding the confidentiality provisions of the Lanterman-Petris Short Act and the Lanterman Developmental Disabilities Services Act. This bill contains other related provisions and other existing laws.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1558](#) (Hernández, Roger D) California Health Data Organization.

Current Text: Introduced: 1/ 28/ 2014 [pdf](#) [html](#)

Introduced: 1/ 28/ 2014

Status: 2/ 14/ 2014- From committee chair, with author's amendments: Amend, and re-refer to Com. on PUB. S. Read second time and amended.

Location: 2/ 14/ 2014-A. PUB. S.

Summary: Would request the University of California to establish the California Health Data Organization and would require health care service plans and health insurers to provide the explanations of benefits or explanations of review to that organization to the extent permitted by federal law. The bill would require the organization to organize the data provided in those documents and to design and maintain an Internet Web site that allows consumers to compare the prices paid by carriers for procedures, as specified. This bill contains other related provisions and other existing laws.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1681](#) (Allen R) Public employees: benefits.

Current Text: Introduced: 2/ 12/ 2014 [pdf](#) [html](#)

Introduced: 2/ 12/ 2014

Status: 2/ 13/ 2014- From printer. May be heard in committee March 15.

Location: 2/ 12/ 2014-A. PRINT

Summary: Current law permits the Board of Administration of the Public Employees' Retirement System to authorize an employer to participate in the prefunding of health care coverage and other postemployment benefits for annuitants. Current law provides certain definitions of terms for purposes of this authority. This bill would make a nonsubstantive change to that provision.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1700](#) (Medina D) Reverse mortgages: notifications.

Current Text: Introduced: 2/ 13/ 2014 [pdf](#) [html](#)

Introduced: 2/ 13/ 2014

Status: 2/ 14/ 2014- From printer. May be heard in committee March 16.

Location: 2/ 13/ 2014-A. PRINT

Summary: Would prohibit a lender from taking a reverse mortgage application or assessing any fees until seven days from the date of loan counseling, as specified. The bill would make specified changes to the disclosure notice. The bill would delete the requirement that the lender provide a written checklist and would, instead, prohibit a lender from taking a reverse mortgage application unless the applicant has received from the lender a specified reverse mortgage worksheet guide.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 894](#) ([Corbett D](#)) Residential care facilities for the elderly: revocation of license.

Current Text: Amended: 2/ 14/ 2014 [pdf](#) [html](#)

Introduced: 1/ 13/ 2014

Last Amend: 2/ 14/ 2014

Status: 2/ 14/ 2014-From committee with author's amendments. Read second time and amended. Re-referred to Com. on HUMAN S.

Location: 2/ 14/ 2014-S. HUM. S.

Summary: Would require, if the Director of Social Services determines at any time during relocation of residents that it is necessary to protect the residents or clients of the facility from physical or mental abuse, abandonment, or any other substantial threat to health or safety, the department to take any necessary action to minimize trauma for the residents, including, but not limited to, preparing the residents' records and medications for transfer and checking in on the status of all transferred residents within 24 hours of transfer. This bill contains other related provisions and other existing laws.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 911](#) ([Block D](#)) Residential care facilities for the elderly.

Current Text: Introduced: 1/ 23/ 2014 [pdf](#) [html](#)

Introduced: 1/ 23/ 2014

Status: 2/ 6/ 2014-Referred to Com. on HUMAN S.

Location: 2/ 6/ 2014-S. HUM. S.

Summary: Under California Residential Care Facilities for the Elderly Act, current law requires that an applicant for a license complete, at a minimum, a 40-hour certification program approved by the State Department of Social Services which includes instruction in a uniform code of knowledge. This bill would change the minimum hours of classroom instruction to 80 hours and would add additional topics to the uniform code of knowledge, including, but not limited to, the adverse effects of psychotropic drugs for use in controlling the behavior of persons with dementia. This bill contains other related provisions and other existing laws.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 984](#) ([Walters R](#)) State teachers' retirement law.

Current Text: Introduced: 2/ 11/ 2014 [pdf](#) [html](#)

Introduced: 2/ 11/ 2014

Status: 2/ 12/ 2014-From printer. May be acted upon on or after March 14.

Location: 2/ 11/ 2014-S. PRINT

Summary: The Teachers' Retirement Law (TRL) creates the Defined Benefit Program of the State Teachers' Retirement Plan for the provision of benefits to members of the plan, which is administered by the Teachers' Retirement Board. The Defined Benefit Program is funded by employer and employee contributions as well as investment returns and state appropriations. Employee and employer contributions are deposited in the Teachers' Retirement Fund, which is continuously appropriated. This bill would make a nonsubstantive change to TRL provisions prescribing employer contributions and their deposit.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

Total Measures: 10

CaIRTA Bills 3/3/2014

Benefits

[AB 1833](#)

(Garcia D) Personal income taxes: voluntary contributions: California Fund for Senior Citizens.

Current Text: Introduced: 2/18/2014 [pdf](#) [html](#)

Introduced: 2/18/2014

Status: 2/19/2014-From printer. May be heard in committee March 21.

Location: 2/18/2014-A. PRINT

Summary: Current law allows an individual to designate on his or her tax return that a specified amount in excess of his or her tax liability be transferred to the California Fund for Senior Citizens. Current law provides that specified provisions relating to the fund remain in effect only until January 1, 2020, and as of December 1, 2020, are repealed, but further provides for an earlier repeal if the Franchise Tax Board determines that the amount of contributions estimated to be received during a calendar year will not at least equal the specified minimum contribution amount for that calendar year, in which case these provisions would be repealed on December 1 of that year. This bill would eliminate that minimum contribution requirement.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 2012](#)

(Morrell R) Voluntary contributions: California Fund for Senior Citizens.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be heard in committee March 23.

Location: 2/20/2014-A. PRINT

Summary: Under the Personal Income Tax Law, taxpayers are allowed to contribute amounts in excess of their tax liability for the support of the California Fund for Senior Citizens until the year in which the minimum contribution is not received, or January 1, 2020, which ever occurs first. This bill would eliminate the requirement that these contributions reach the minimum contribution amount.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 2175](#)

(Daly D) Personal income tax: credit: long-term care.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be heard in committee March 23.

Location: 2/20/2014-A. PRINT

Summary: The Personal Income Tax Law and the Corporation Tax Law allow various credits against the taxes imposed by those laws. This bill would state that it is the intent of the Legislature to enact legislation that would allow for a credit in the amount of \$500 for costs paid or incurred for long-term care of a family member against the tax imposed by the Personal Income Tax Law.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 1220](#)

(Torres D) State teachers' retirement.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be acted upon on or after March 23.

Location: 2/20/2014-S. PRINT

Summary: Would amend the Teachers' Retirement Law to provide a definition of base allowance for the purpose of determining specified supplemental benefits and revise the definition of a break in service to account for certain times not recognized as part of the school year. The bill would revise the definition of credited service to account for members whose contributions have been reduced because of PEPRA and would revise the definition of final compensation to account for the calculation of service based on months rather than years. The bill would make conforming changes in how member contributions are credited to reflect reductions applied when payments are determined to have been paid to enhance a member's benefits.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

Total Measures: 4

CalRTA Bills 3/3/2014

Insurance

[AB 2347](#)

(Gonzalez D) Insurance policies.

Current Text: Introduced: 2/21/2014 [pdf](#) [html](#)

Introduced: 2/21/2014

Status: 2/24/2014-Read first time.

Location: 2/21/2014-A. PRINT

Summary: Current law requires that a disability insurance policy or life insurance policy and certificate offered for sale to individuals 65 years of age or older in California provide a 30-day examination period during which the applicant may return the contract and receive a refund of all premiums and any membership fee paid. This bill would specify that those requirements apply to individual and group disability and group life insurance policies and certificates. The bill would require that the notice be in 12-point bold type. This bill contains other related provisions and other existing laws.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 1182](#)

(Leno D) Health care coverage: rate review.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be acted upon on or after March 23.

Location: 2/20/2014-S. PRINT

Summary: Current law allows a health care service plan that exclusively contracts with no more than 2 medical groups to provide or arrange for professional medical services for enrollees of the plan to meet this requirement by disclosing its actual trend experience for the prior year using benefit categories that are the same or similar to those used by other plans. This bill would specify the benefit categories to be used for that purpose and would make other related changes. This bill contains other related provisions and other existing laws.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[SB 1241](#)

(Leno D) Health care coverage: marketplace transparency.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be acted upon on or after March 23.

Location: 2/20/2014-S. PRINT

Summary: Current law, the Knox-Keene Health Care Service Plan Act of 1975, provides for the licensure and regulation of health care service plans by the Department of Managed Health Care. Current law provides for the regulation of health insurers by the Department of Insurance. Current law requires a plan or insurer to provide certain disclosures of the benefits, services, and terms of a contract or policy. This bill would declare the intent of the Legislature to enact legislation to increase transparency in the health care service plan contract and health insurance policy marketplace.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

Total Measures: 3

CalRTA Bills 3/3/2014

Long-Term Care (LTC)

[AB 1816](#)

(Yamada D) Long-term health care facilities.

Current Text: Introduced: 2/18/2014 [pdf](#) [html](#)

Introduced: 2/18/2014

Status: 2/27/2014-Referred to Com. on HEALTH.

Location: 2/27/2014-A. HEALTH

Summary: Would require the State Department of Public Health to complete its investigation of a complaint within 40 working days of its receipt, except that this period may be extended up to an additional 30 days if the department has diligently attempted, but has not been able to obtain, necessary evidence related to the investigation. The bill would require the department, if it extends an investigation beyond 40 working days, to notify the complainant, in writing, of the basis for the extension.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1899](#)

(Brown D) Residential care facilities for the elderly: quality of care.

Current Text: Introduced: 2/19/2014 [pdf](#) [html](#)

Introduced: 2/19/2014

Status: 2/27/2014-Referred to Com. on HUM. S.

Location: 2/27/2014-A. HUM. S.

Summary: The California Residential Care Facilities for the Elderly Act, provides for the licensure and regulation of residential care facilities for the elderly by the State Department of Social Services. This bill would make a person who has had his or her previous license revoked for abandonment of the facility ineligible for licensure for a period of 10 years following the revocation. Because a violation of this provision could be a crime, the bill would impose a state-mandated local program. This bill contains other related provisions and other existing laws.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 1996](#)

(Brown D) Long-term health care facilities: quality of care.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be heard in committee March 23.

Location: 2/20/2014-A. PRINT

Summary: Current law establishes the State Department of Public Health and sets forth its powers and duties, including, but not limited to, the licensure and regulation of health facilities, including, but not limited to, long-term health care facilities, as defined. This bill instead would require inspection at least once every year and would delete obsolete references to a health facility inspection pilot program. This bill contains other related provisions and other current laws.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

[AB 2044](#)

(Rodriguez D) Residential care facilities for the elderly.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be heard in committee March 23.

Location: 2/20/2014-A. PRINT

Summary: Would require every licensed residential care facility to be subject to an annual unannounced visit by the State Department of Social Services, as prescribed, and would require the department to conduct more frequent unannounced visits under specified circumstances. This bill contains other related provisions and other existing laws.

POSITION

RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

SB 1153

(Leno D) Residential care facilities for the elderly.

Current Text: Introduced: 2/20/2014 [pdf](#) [html](#)

Introduced: 2/20/2014

Status: 2/21/2014-From printer. May be acted upon on or after March 23.

Location: 2/20/2014-S. PRINT

Summary: Would authorize the State Department of Social Services to order a suspension of new admissions prohibiting a residential care facility for the elderly from admitting new residents under certain circumstances, including, among others, if the department finds that the facility has violated applicable laws or regulations, and the violation presents a direct or immediate risk to the health, safety, or personal rights of a resident or residents of the facility. By expanding the scope of a crime, this bill would impose a state-mandated local program.

POSITION RECOMMENDATION: Support Support if Amended Oppose Oppose if Amended
 Disapprove Approve FOR THE RECORD (no recommendation): Neutral Watch

Total Measures: 5

