

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/20/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Jeanne Meier
ADDRESS 5902 Badger St.
CITY McFarland STATE WI ZIP 53558
ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE Feb 21, 2000

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Melvin B. Sensenbrenner
ADDRESS 4701 Goldfinch Dr.
CITY MADISON STATE WI ZIP 53714
ORGANIZATION, IF ANY SFA

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Debra Marx
ADDRESS 931 Alpine Ct.
CITY Oshkosh STATE WI ZIP 54901
ORGANIZATION, IF ANY UP1199

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR with Amendment OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/21/06

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Michelle Cooper
ADDRESS 713 McKinley
CITY Omro STATE WI ZIP 54906
ORGANIZATION, IF ANY 1199 / UPQHC

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR with Amendment OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2-21-00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME WILLIAM C NUBERT JR
ADDRESS 312 RIDGEWAY DRIVE
CITY DOWSTOWN STATE NE ZIP 53118
ORGANIZATION, IF ANY 1199 W UPWA - SEIU

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
~~HR 3013/1~~
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Karina Persson
ADDRESS 139 W Wilson St Apt 206
CITY Madison STATE WI ZIP 53703
ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB-211
KRB 3013/1
(BILL NUMBER)

DATE 02-21-00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Lois Persson

ADDRESS N6715 Wolfgram Dr.

CITY Pardeeville STATE WI ZIP 53954

ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB-211
KRB 3013/1
(BILL NUMBER)

DATE 2-21-00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME PAUL PERSSON

ADDRESS N6715 WOLFGRAM DR

CITY PARDEEVILLE STATE WI ZIP 53954

ORGANIZATION, IF ANY 1199WUPQHC SEIU

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF LAB 3013/1-211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Daniel England
ADDRESS 218 Well St.
CITY Marionville STATE MO ZIP 63560
ORGANIZATION, IF ANY Local 13

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2-21-2000

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Michael Ellestad
ADDRESS 5414 Starker Avenue
CITY Madison STATE WI ZIP 53714
ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB211
(BILL NUMBER)

DATE 2/22/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Rep. Joan Wade Spallner

ADDRESS _____

CITY _____ STATE _____ ZIP _____

ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB211
(BILL NUMBER)

DATE 2-21-00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Senator Carol Rossley

ADDRESS P.O. Box 7882

CITY Madison STATE WI ZIP 53702

ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME KEN OPIN
ADDRESS 1334 APPLGATE RD.
CITY MADISON STATE WI ZIP 53713
ORGANIZATION, IF ANY WFT

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME BRUCE RENWICK
ADDRESS 7058 Hwy 19
CITY Wauwatosa STATE WI ZIP 53597
ORGANIZATION, IF ANY 1199U UP

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF 211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Mary Fowler
ADDRESS N 3090 Tomlinson Rd
CITY Poyette STATE WI ZIP 53253
ORGANIZATION, IF ANY DCTF / PPCU / YMMHL / 1199

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF Senate Bill 211
(BILL NUMBER)

DATE 2/21/2000

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Linda Mertes
ADDRESS 2 Harvest Circle
CITY Madison STATE Wis ZIP 53713
ORGANIZATION, IF ANY UP-1199 employed as RN at Mandota Mental Health Institute

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF 211 - Bell
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Nancy White
ADDRESS 13214 Hickory
CITY Waupun STATE Wi ZIP 53963
ORGANIZATION, IF ANY 1199w/up

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR

OPPOSED

INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR

OPPOSED

INFORMATION

CONSIDERATION OF SB-211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME LeNore Wilson
ADDRESS W8514 Thompson Rd
CITY Poynette STATE Wi ZIP 53955
ORGANIZATION, IF ANY Dist. 1199w/up, SEIU, AFL-CIO

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR

OPPOSED

INFORMATION

Would like panel with Linda Mertes, Bruce Renwick, Nancy White, Mary Fowler

WOULD LIKE TO REGISTER

IN FAVOR

OPPOSED

INFORMATION

2) Speaking

CONSIDERATION OF SB 211
(BILL NUMBER)

DATE 2/21/00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Senator Mary Dmgewieski

ADDRESS _____

CITY _____ STATE _____ ZIP _____

ORGANIZATION, IF ANY 30th Senate District

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

CONSIDERATION OF 211
(BILL NUMBER)

DATE 2-21-00

JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

NAME Lee Loveall

ADDRESS 1235 West Blvd

CITY RACINE STATE WI ZIP 53405

ORGANIZATION, IF ANY _____

WOULD LIKE TO TESTIFY (APPEAR BEFORE THE COMMITTEE)

IN FAVOR OPPOSED INFORMATION
With amendment

WOULD LIKE TO REGISTER

IN FAVOR OPPOSED INFORMATION

PRELIMINARY

1999-2000

LRB-3013/1

STATE OF WISCONSIN

APPENDIX TO 1999 SENATE BILL 211

REPORT OF JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS

(Introduced by Senators Drzewiecki, Roessler and Darling; cosponsored by Representatives Musser, Underheim, Ryba, Albers, Turner, Boyle, Hundertmark, Goetsch, Gronemus, Kaufert and Ainsworth.)

An Act to renumber and amend 40.02 (48) (am) and 40.02 (48) (c); and to create 40.02 (17) (n), 40.02 (48) (am) 22., 40.02 (48) (c) 18. and 40.65 (4w) of the statutes; relating to: classifying certain nurses employed by the state as protective occupation participants under the Wisconsin retirement system.

EXTRACT OF COMMITTEE'S RECOMMENDATION ON THIS BILL

The Joint Survey Committee on Retirement Systems finds that Senate Bill 211 [represents good public policy, and the Committee recommends its passage] [does not represent good public policy, and the Committee does not recommend its passage].

PURPOSE OF THE BILL

Under current s. 40.02 (48) (a), Stats., a "protective occupation participant" for purposes of the Wisconsin Retirement System (WRS) is any participant whose principal duties are determined by the participating employer to involve active law enforcement or active fire suppression or prevention, provided the duties require frequent exposure to a high degree of danger or peril and also require a high degree of physical conditioning.

Under s. 40.02 (48) (am), Stats., protective occupation participants include conservation wardens, conservation patrol boat captains, conservation patrol boat engineers, conservation pilots, conservation patrol officers, forest fire control assistance, members of the state patrol, state motor vehicle inspectors, police officers, fire fighters, sheriffs, undersheriffs, deputy sheriffs, state probation and parole officers, county traffic police officers, state forest rangers, fire watchers employed by the Wisconsin Veterans Home, state correctional-psychiatric officers, excise tax investigators employed by the Department of Revenue, special criminal investigations agents in the Department of Justice, assistant or deputy fire marshalls and persons employed under s. 61.66 (1), Stats. (combined protective services departments for villages).

If a person is classified as a protective occupation participant, his or her normal retirement age is lower than those of other participants and the percentage multiplier used to calculate his or her formula benefit retirement annuity is higher than for general employees.

If a person wishes to contest a determination by an employer that he or she is *not* a protective occupation participant and contends that his or her duties, in fact, do require a frequent exposure to a high degree of danger or peril and also require a high degree of physical conditioning, the employe may appeal to the Department of Employee Trust Funds (DETF) Board by filing a written appeal with the board. [See s. 40.06 (1) (e) 1., Stats.]

Participating employers and state agencies are required to notify the DETF of persons classified as protective occupation participants. [See s. 40.06 (1) (d), Stats.]

Under s. 40.06 (1) (dm), Stats., each determination by a department head regarding classification of a state employe as a protective occupation participant is reviewed by the Department of Employment Relations (DER) and the DER must certify that determination.

Also, the DETF may review any determination by a participating employer to classify an employe who is not a state employe as a protective occupation participant and may appeal the determination to the DETF Board. [See s. 40.06 (1) (em), Stats.]

This bill amends the enumeration in s. 40.02 (48) (am), Stats., to specifically include as a protective occupation participant a *nurse* employed at: (1) a state correctional institution; (2) a secured correctional facility; (3) a mental health institute; (4) the Wisconsin Resource Center; or (5) a secure mental health unit or facility. It also adds this position to the definition of protective occupation participant for purposes of the duty disability program under s. 40.65, Stats.

The bill provides that these persons will not be entitled to duty disability benefits for injuries or disease that occurred before the effective date of the bill which takes effect on the January 1 of the calendar year beginning after its publication as a state law.

No creditable service as a protective occupation participant will be granted for service that was earned before the effective date of the bill.

ACTUARIAL EFFECT

This bill will have no actuarial effect on the WRS since the costs of services rendered after the bill becomes law will be paid for by increases in contribution rates.

PROBABLE COSTS

It is estimated that 139 nurses employed by the Department of Corrections, earning \$5,034,100 annually would be affected by this bill. The WRS costs that would be associated with the bill equal 4.4% of payroll or \$221,500 annually.

The Department of Health and Family Services estimates that a total of 305.15 FTE nurse positions are authorized at the mental health institutes, the Wisconsin Resource Center and the

secure treatment center and the cost to the agency is \$285,500 GPR and \$244,100 PR annually. Because approximately 50% of the positions are funded by the Medical Assistance program and the GPR portion of the Medical Assistance related to the program revenue is \$45,200, making the total GPR cost of the proposal \$330,700. The annualized cost would therefore be \$574,800.

The DETF estimates that startup efforts, clarifying the provision of the new law and revision of presentation materials, staff training and procedures revision would equal \$272. During the first year, 10 additional field presentations for employers and labor organizations of nurses would cost \$850, 500 inquiries through telephone calls, letters, e-mails and walk-in visitors would cost \$1,428. The anticipated 5% increase in the number of retirement estimates that would be calculated manually due to prorating service credit between multiple employment categories and a 5% increase in manual service credit prorations when service is credited by the department results in a cost of \$765. The total anticipated cost on an annualized basis is \$2,200.

PUBLIC POLICY

Protective occupation participants have a higher benefit formula (2% for protective occupation participants with Social Security and 2.2% for those without) and an earlier normal retirement date than general employees (age 54 for employees with less than 25 years of service and age 53 with those with more than 25 years).

This bill changes the employer certification process relative to the determination of protective status under the WRS. Rather than allowing the employers to make the determination of whether these positions' duties require a frequent exposure of high degree of danger or peril and require a high degree of physical conditioning, the nurses would become protective occupation participants.

RECOMMENDATION

The Joint Survey Committee on Retirement Systems finds that 1999 Senate Bill 211 [represents good public policy, and the Committee recommends its passage] [does not represent good public policy, and the Committee does not recommend its passage].

2/21/00

STATE OF WISCONSIN
JOINT SURVEY COMMITTEE ON RETIREMENT SYSTEMS
MONDAY, FEBRUARY 21, 2000
11:00 A.M.
ROOM 417 NORTH (GAR), STATE CAPITOL BLDG.

A G E N D A

1. Call to Order and Roll Call.
2. Consideration of the Minutes of the January 24, 2000 Meeting.
3. **Assembly Bill 9** relating to granting creditable service under the Wisconsin retirement system for service in the federal peace corps or VISTA public service programs or in any national service program under the federal National and Community Service Act of 1990.
4. **Assembly Bill 124** relating to creditable military service under the Wisconsin retirement system.
5. **Senate Bill 88** relating to creditable military service under the Wisconsin retirement system.
6. **Assembly Bill 145** relating to granting creditable service under the Wisconsin retirement system for service in the federal public health service.
7. **Senate Bill 105** relating to classifying certain teachers employed by the state as protective occupation participants under the Wisconsin retirement system.
8. **Senate Bill 211** relating to classifying certain nurses employed by the state as protective occupation participants under the Wisconsin retirement system.
9. **Assembly Bill 388** relating to the normal retirement date under the Wisconsin retirement system for individuals employed by certain school districts.
10. **Assembly Bill 426** relating to death benefits provided under the Wisconsin retirement system and making an appropriation.
11. **Assembly Bill 455** relating to establishing a presumption for employment-connected disease for state and county fire fighters.
12. **Assembly Bill 656** relating to granting creditable service under the Wisconsin retirement system to certain assistant district attorneys formerly employed by Milwaukee County and making an appropriation.

(An Executive Session may be held during or immediately following the public hearing on the above and/or any other items pending before the Committee)

13. Other Matters.
14. Adjournment.