

Oklahoma's Legislative Process: Executive Director Panel Discussion

Luke Martin, Majority Plus Consultants: Moderator
Executive Directors: Tom Spencer, TRS; Joe Fox,
OPERS; Steve Snyder, Police Pension; Bob Jones;
Firefighters Pension; Ginger Sigler, Law Enforcement
Retirement
OPFTEC
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The Unwritten Rules of Working With the Legislature

Credibility is Key:

- Never lie to or mislead a Legislator. If you aren't candid with legislators or mislead them in any way, you are finished.
- You must be knowledgeable. If you have a conversation with a legislator and can't answer basic questions about your bill or your Plan, you have no business being at the Capitol.
- Don't promise what you can't deliver. If you promise you will do something or get them some information, you had better follow through. Don't tell a Legislator "my Board can support that" unless you are 100% certain it's a fact.

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The Unwritten Rules of Working With the Legislature

Be Prepared:

- Do your homework and make sure that you have all of the facts at your fingertips.
- Always be respectful of the legislators time and be as brief as possible.
- Always come prepared with written documentation that supports your position for your legislator. Keep literature and information brief. Provide material that is easy to read with main points highlighted.

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The Unwritten Rules of Working With the Legislature

Know your subject matter well:

- You are (or should be) the expert. You should have a firm grasp on the history of your Plan and past legislation as much as the current lay of the land.
- You also should determine the specific impact on your Plan from a bill if you can. The stats from the professional actuaries are typically taken like they were handed down as sacred tablets from on high.
- Constitutional or tax problems with legislation get attention but you better not be exaggerating!

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The Unwritten Rules of Working With the Legislature

Know your legislator(s):

- Do a little digging and find out as much as you can about the legislator(s) you are dealing with. This goes double for the chairman of the pension or retirement committee.
- Do they have a relative that's a teacher, prison guard, firefighter, police officer or trooper?
- Learn what is important to your legislator. Do they want to be regarded as friend of a certain interest group? Are they a reformer?

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The Unwritten Rules of Working With the Legislature

Don't underestimate the importance of knowing the legislative staff.

- The relationship with staff is also important. If the staff sees you as the expert, it will help getting the language you need in a bill, or explain why a bill can hurt your Plan.
- Staff won't betray a confidence, but they can often give hints on a variety of topics. Just as with legislators your word is your bond.
- *The staff is needy. Get them requested data quickly and answer their questions promptly. You are helping them look good to the legislator they are working with.

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The Unwritten Rules of Working With the Legislature

Legislative/Executive assistants are important too.

- These ladies (& an increasing number of gentlemen) are the gatekeepers for their members. Treat them with genuine kindness. Their kids and grand-kids really are pretty cute.
- Be empathetic. Their jobs are tough and their demands are many. They will get you in to see their member if they regard you as one of the good guys or gals.
- Be punctual and patient. Be on time for appointments. Don't pace, tap your shoes, keep looking at your watch or get irritated if the member is busy or late.

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The Unwritten Rules of Working With the Legislature

A legislator has a personal retirement issue to discuss?

This is a gift!!!

- Legislators are human beings. They have personal, family or constituent retirement issues all of the time. You will reap dividends for many years if you answer a question quickly or fix a problem efficiently.
- Take one of your staff to talk to legislators if you need to get into the weeds about a benefit issue.
- Give them personal service with Plan forms and other paperwork.

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The Unwritten Rules of Working With the Legislature

Didn't your mother tell you to say please and thank you?

- Every experienced legislator will tell you that “politics is personal”.
- Believe it or not, legislators will try and help individuals and groups who treat them with respect and who acknowledge them when they get your bill passed or get a horrible bill killed.
- Old fashioned thank you notes or letters are an easy way to get a good reputation. Don't forget assistants and staff.

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The Unwritten Rules of Working With the Legislature

Talk to legislators who introduce bad bills.

- There are legislators who introduce bills just because they thought something up and they think it's a good idea. But typically one of their friends, constituents or an interest group wants that bill.
- Advise the legislator of any unknown fiscal impact or something that would be inconsistent with the tax code.
- There is a high likelihood that the legislator has done his or her part just by introducing that bill. The legislator may be far less concerned that it actually passes.

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The Unwritten Rules of Working With the Legislature

Don't wait until the bill is heard at committee to make your case.

- If you show up at a committee hearing and you haven't talked to any legislator about the bill on the agenda you're interested in or concerned about, you are probably sunk.
- You must talk to the committee chair and committee members if possible. Leave a brief bill summary and the issue that is bothersome with the member.
- When you appear at a committee, remember that rarely anyone on the committee knows about pension issues. Keep it as simple as possible.

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The Unwritten Rules of Working With the Legislature

Coalitions and Networks can make the difference

- Retirement plans have several common issues. We can be more effective individually if we work collectively.
- The directors on this panel do this all the time. It is also good to know the lobbyists and leaders of the membership groups.
- Having a good relationship with the firefighter association or the OEA or OPEA is generally a good idea even if you don't represent that constituency.

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The Unwritten Rules of Working With the Legislature

Know the Legislative Process

- The legislative process is like making sausage. Its ugly and takes on many forms.
- You need to be familiar with the rules of the House and Senate. They are different.
- A bill takes many forms (introduced, engrossed, enrolled) and can be amended multiple times (committee amendments, committee substitutes, floor amendments, floor substitutes, and conference committee substitutes).
- Striking title and enacting clauses are methods used by a legislator to keep control of a bill.

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Thank You!

TRS

OKLAHOMA

Teachers' Retirement System of Oklahoma



Okla. Public Employees' Retirement System



Okla. Police Pension & Retirement System



Okla. Firefighters Pension & Retirement System



Okla. Law Enforcement Retirement System

OLERS



Majority Plus Consultants

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OKLAHOMA POLICE PENSION AND RETIREMENT SYSTEM



Steven K. Snyder
Executive Director

Steve Snyder is the Executive Director and Chief Investment Officer of the Oklahoma Police Pension and Retirement System and was appointed to that position in 2009. He was the Deputy Executive Director/General Counsel of the System from 2005 through 2008. Mr. Snyder's connection with the System goes back to 1991 when he became an Assistant Attorney General under Susan Loving. He was the first contract Assistant A.G. for the System and continued in that role until his employment in 2005. During his tenure at the Attorney General's office he was the liaison attorney to almost every other state pension system such as OPERS, OLERS, Firefighters Pension, as well as the Oklahoma State Pension Commission.

He also represented the Office of Personnel Management and was the assistant attorney general called upon to give advice on numerous federal issues such as USERRA, the ADA, FMLA, and the FLSA. Mr. Snyder practiced law with the firms of Carson, Rayburn, Hirsch & Mueller, as well as Fenton, Fenton, Smith, Reneau & Moon from 1982 to 1991. His practice involved insurance and corporate defense litigation, commercial/bankruptcy litigation in state and federal district courts and administrative agencies.

Snyder received his B.A. from the University of Oklahoma in 1979 majoring in History, International Relations, and Political Science. He then received a Juris Doctor from the University of Oklahoma College of Law in 1982. Snyder is a retired Lt. Colonel in the Oklahoma Air National Guard serving from 1990 to 2015.

OKLAHOMA LAW ENFORCEMENT RETIREMENT SYSTEM



Ginger Sigler
Executive Director

Ginger Sigler is the Executive Director of the Oklahoma Law Enforcement Retirement System (OLERS). Ms. Sigler took over that position on December 1, 2007. Prior to joining OLERS she was the Controller for the Oklahoma Firefighters Pension and Retirement System for 18 years. Ms. Sigler started her career at Finley and Cook LLP accounting firm which does a tremendous amount of work for the retirement systems in the State of Oklahoma.

Ms. Sigler is a CPA and has an accounting degree from Oklahoma State University. She has three sons Easton, Keaton and Scotty and resides in Oklahoma City with her husband Scot.

OKLAHOMA FIREFIGHTERS PENSION SYSTEM



Robert E. Jones, Jr.
Executive Director

Robert joined the Oklahoma Firefighters Pension and Retirement System as Assistant Executive Director on July 1, 1995, and was named Executive Director on July 1, 1999. He served as Deputy Director of the Oklahoma Public Employees Retirement System from July 1, 1993 to June 30, 1995. From December 1984 to June 30, 1993, he served on the Staff of the Oklahoma State Senate with primary responsibility for issues pertaining to employee benefits. Prior to 1984, he was employed in various capacities in the oil and gas industry.

Mr. Jones received his BBA from the University of Oklahoma and his JD from Oklahoma City University. He is a Certified Public Accountant and an Attorney licensed to practice law in the State of Oklahoma.

TEACHERS' RETIREMENT SYSTEM OF OKLAHOMA



Tom Spencer
Executive Director

Tom Spencer has been the Executive Director of the Teachers' Retirement System of Oklahoma since November 1, 2014. Prior to that he served in the same capacity for the Oklahoma Public Employees Retirement System ("OPERS") beginning his tenure there in August, 2003.

Tom has a business management degree from Oklahoma City University and a law degree from the University of Oklahoma. He has 30 years of state service. He served as an Assistant Attorney General for 4 different A.G.'s. He was State Treasurer Robert Butkin's Deputy Treasurer/Chief of Staff. He was also Governor Brad Henry's first General Counsel. He is a member of the National Association of State Retirement Administrators (NASRA) and the National Council on Teacher Retirement (NCTR).

He lives in Edmond with his wife Marsha. His daughter is a working actress in Los Angeles, CA.



Luke C. Martin

At a young age, Luke Martin learned the value of hard work. Having grown up on a farm in southwestern Oklahoma, Luke grew accustomed to long work hours, often in adverse weather conditions. He continues to uphold his committed work ethic, running a family cattle business at a farm in Sentinel, but Luke's primary energies are applied in the political realm.

Luke Martin attended Oklahoma State University where he earned a B.S. in Business Administration. He began his career with five years on the staff of Oklahoma Governor Brad Henry, serving as a personal assistant, cabinet liaison, and deputy legislative liaison. He worked on a variety of issues including education, early childhood development, economic development and public safety. Luke joined the Benham Companies, the largest architectural and engineering services firm in the state. He served as the client relations manager developing new business and managing existing accounts.

In 2009, Luke became an associate with Oklahoma Political Strategies and The Capital Group. Luke managed several campaigns and ballot initiative with OPS. Asn associate with The Capital Group, Luke lobbied for a number of issues and clients including healthcare, energy, and higher education. In 2010, Luke established his own lobbying and consulting firm - Capital Plus. Capital Plus, a government relations consulting firm. Luke assists in developing legislative strategies and effectively advocates legislators on behalf of clients.

Luke serves on the Advisory Board for the Sigma Nu Fraternity at Oklahoma State University. He is also very active with Allied Arts and the United Way. He is a graduate of Leadership Oklahoma, Class XXII, and was awarded the "Achiever Under 40" designation by the Journal Record in 2009. Luke is married to Kylie, a consultant for CompSource Oklahoma. They have three sons, Gamble, Oxley and Grady, and live in Choctaw.



Joseph A. Fox

Joe Fox has served as Executive Director of OPERS since November 2014. He previously served as OPERS' General Counsel from 2005 to 2014.

Prior to joining OPERS in 2005, Joe served as the Chief Clerk, General Counsel (2000 – 2005), and staff attorney (1991 – 2000) for the Oklahoma House of Representatives. Before entering the public sector, Joe was in private law practice.

Joe has been a speaker and panelist at seminars sponsored by the Oklahoma Bar Association and various associations regarding retirement and pension issues, the legislative process, and Oklahoma's tax system. He is a member of the National Association of State Retirement Administrators (NASRA) and the National Association of Public Pension Attorneys (NAPPA).

Joe received a B.S. in Accounting from Oklahoma State University in 1983 and a Juris Doctor from the University of Oklahoma College of Law in 1987.