

Oklahoma's Legislative Process: Executive Director Panel Discussion

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Firefighters Pension; Ginger Sigler, Law Enforcement
Retirement

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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.

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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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!

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?

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 can and answer their questions promptly. You are helping them look good to the legislator they are working with.

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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**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.



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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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 be introducing that bill. The legislator may be far less concerned that it actually passes.

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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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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.

The Unwritten Rules of Working With the Legislature

Know the Legislative Process

- The legislative process is like making sausage. It's 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.

Thank You!



Teachers' Retirement System of Oklahoma



Okla. Public Employees' Retirement System



Okla. Police Pension & Retirement System



Okla. Firefighters Pension & Retirement System



OLERS

Okla. Law Enforcement Retirement System



Majority Plus Consultants