

Understanding the Legislative Process

Statewide Legislative Workshop - January 21, 2006 - Tampa, FL

9:00 AM – John Miliziano opened the meeting with introductions and remarks. Introduced principal of Jefferson High School, host Lou Diaz, Senator Victor Crist, FASA Executive Director Jim Warford, FASA lobbyist Juhan Mixon, Vern Crawford from Palm Beach County and Chris Brown from AIG/valic. Thanked workshop sponsors FASA, Tampa Bay Area Coalition, AIGvalic, Miami/Dade, Palm Beach, Seminole, and Orange County school administrator associations. Jim Warford introduced FASA President Joel Herbst and incoming President Ruth Hall.

Twenty-two districts were represented at the workshop. Miliziano said that the purposes of the workshop were to:

- Learn and be aware of what's going on with our profession.
- Become advocates for our legislative agenda.
- Learn how to network more effectively.
- Learn how to get involved with legislative process and grass roots lobbying.

9:15 AM - Senator Victor Crist. Has been 14 years in the legislature, serving education. Moved up through civic associations to House of Representatives for Tampa. Learned the process of legislation from personal experience. Introduced Josh Richards his legislative aide and spoke of his wife, vice-president of alumnae at USF.

Senator Crist spoke about priorities coming up in the 2006 legislative session:

- Sick Leave Bill (took up stance against McKay)
- 25-year retirement option – already offered to law enforcement, military, etc.
- SB 1064 by Clary – DROP extension. He supports this Bill
- SB 102 by Wise – Retiree contracted re-employment. He supports this Bill
- SJR 1150 by Pruitt – He has concerns about this Bill
 - (1) 65% of \$\$ must be spent in classroom - uncomfortable with mandates.
 - (2) Class size: Focus on implementation, more realistic timeframe. Find solutions
- Most important issue: Strengthen your organization! Some could be stronger – can become a driving force in the process. Partnerships with like interests.

Senator Christ also spoke about grass roots initiative strengthening:

- Timing: Don't wait for a crisis. Senators and Representatives are bombarded with ideas, issues during the legislative session. Get with them early on – summer and fall – before session. Come back to remind them during session.
- Organization: Don't expect elected officers and lobbyists to do all the work. Cultivate the friendships with folks who represent you in your districts.
- Remain positive, even after defeats. Quietly share negative feelings with legislators, do not publicly blast them. Next year is a new picture – you'll need their help.

- Don't be partisan. Be registered to vote. Forget about personal political issues – it's not about you, it's about your organization's causes.

Senator Christ stressed the importance of building relationships and partnerships:

- Make time for legislators, groups, etc. on off duty time. Friendships. 90% of legislators are there because they believe in the community and what they do.
- Make sure they know what you're doing that they LIKE.
- Share the glory and share the work. Make them bring something to the table.
- Make it a reciprocal relationship.
- Be open-minded to legislators' new ideas.
- Share and you will receive.
- Reward a job well –done. Publicly recognize legislators who support you. People need to see that legislators are working for you.

The Senator responded to **questions**:

- How do you like your job? *Enjoyed the House more. Ideas are generated; you are at forefront of the fight. Enjoys the legislative process. Only paid \$30,000 per year and \$50 per diem. Should not be about millionaires representing you.*
- Sick leave bill – Did McKay generate it because of one Superintendent with hundreds of days? *Not sure but heard the same scenario.*
- School calendar legislation – will more research be done on the impact of such a change on instructional time, etc. before the law is passed? *Understands the argument, but it's a decision that districts should be making. Uncomfortable with a mandate.*
- Health Insurance Subsidy: Best guess as to future of success of these initiatives? Actuarial studies are done now, which we were told was the problem last year. *Not sure of the status of that issue. Will stay in touch with organizations about the status. Be aggressive in being sure legislators are aware of your issues.*
- 1.6% Multiplier – in 32 years law enforcement, firemen, school board members, etc., have gotten their multiplier increased. Each time we ask for even a small increase, we are shot down due to volume of employees and the amount it will cost. Advice? *Mayor of Tampa got a similar issue passed that cost \$600 million. She had help from their organizations, and they worked diligently. Make your voice heard, push your issue to the forefront, and grab your piece of that pie.*
- State has significantly reduced the amount that a school district has to contribute to the FRS Trust Fund – *Legislature would have to raise the amount back up in order to raise the multiplier from 1.6% to 2%. School districts would have to make up the increase from salaries, etc. FASA and administrators associations need to unite with school board associations and superintendent's association and work together to make the voice larger and more effective.*
- How to bring our issues to the forefront? *Your state lobbying group is too small, only Juhan Mixon and a few staffers. Need more involvement in making issues known. Prioritize your time – get more people to walk the halls, more people in delegation to Tallahassee.*

- Is there a pamphlet available to take to our members at home that explains how the legislative process works? *Booklets on effective grassroots are developed by organizations, and also a legislative liaison is effective for disseminating news. Organization is important.*
- Do emails make a difference, or do they have to be handwritten messages? *More personalized message or phone calls get the most attention. Form letters emailed will not get as much attention. Thousands of emails get sent a day during session.*
- Hearing any outrage from teachers with certificate problems after years and years of service? *Yes, because teachers' associations are good about getting their memberships to write, along with parents.*
- Who is the most effective lobbying group in Tallahassee from educational realm? *Personally, local school districts and their unions, organizations, etc. However, every legislator is different. Relationships are the key.*
- High school reform issue – committee putting together – are they experts? Where are they getting their ideas? *Some are talking to school boards, some to legislators, some have committees who do interim studies and choose themselves what issues they want to cultivate. Best ideas come from practitioners.*
- Initiatives that start immediately for implementation next year – can lead time be provided? Lack of lead time often leads to unsuccessful initiative. *Example: Class size amendment – admirable initiative, but you need tools to do it. Agree that part of initiative should be realistic implementation. Example – gambling in South Florida – valuable chip that was burned because very little funding will go to education.*
- Does legislature realize what Jessica Lunsford Act has done to education (fingerprinting out of control)? *Sometimes we think we see it clearly until implementation. Then unforeseen glitches become apparent. Big “glitch” that will be going through the review process.*

10:45 AM - Chris Brown – (AIGvalic) “The Florida Retirement System – Planning for Financial Security – The Details You Need to Know”.

- FRS is biggest retirement plan in country partially because of rules employees do not know or understand.
- No school board in Florida makes a significant effort to educate employees about how plans work. Sources of retirement income are almost half made up from FRS.
- Year 1950 – 16.5 workers for every retiree; Year 2045 – two workers for every retiree.
- FRS: Defined benefit plan. Defined by formula. Private sector pension plans are going away. School districts are in dire straits financially. Most are putting in early retirement plan options.
- Defined benefit vs. Defined Contribution: Employee bears the risk; no guaranteed pension;
- Normal: 62 with 6 years of service or 30 years of service.
- Penalty for early retirement before 62 – 5% for each year not 62 years of age. Wait until you turn 62 and no penalty.
- Retirement factor $(1.6) \times (\text{Years of Service}) \times (\text{average high five salary}) = \text{benefit}$.
- 1.6 multiplier applies to all years worked if retiree works more than 30 years, not just years in excess of 30. Senior management: 2%.
- Option One: Pays benefit as long as you live, but stops upon your death.
- Option Two: Pays benefit from day you retire until death, and then pays beneficiary 10 years certain from the day you retire.
- Option Three – pays you as long as you live, then pays spouse as long as he/she lives.

- Option Four – Joint and 2/3 survivor. Pays until your or spouse dies, then one third less. All choices are irrevocable.

DROP:

- Upon retirement, you keep working and normal benefits you would receive go into a special DROP account at 6.5%. Eligibility begins when you reach normal retirement. Funded pre-tax. Upon entering, you cannot change: (1) years of service, (2) option selection, (3) FRS retirement date, or (4) maximum date of resignation.
- Advantages: Large monthly investment, 6.5% and keep same job and pay.
- Disadvantages: No changes can be made, set employment date.
- DROP Lump Sum payment options – put you in higher tax bracket.
- Roll Over option – Into a traditional IRA or 403B for tax benefits.
- Combination Option – partial lump sum/rollover – takes into consideration withholding.
- Coming soon: Roth 403B – tax free growth.
- Day of termination stops 6.5% interest growth.

DROP Extension Update:

- Law was that K-12 Instructional Staff could remain three years in one-year increments. 2006 is the end of the three years.
- There is a DROP bill now being discussed that would include K-12 administration. Actuarial study has been done last year and a lot of supporters exist. Looks pretty realistic.
- 60-month clock starts ticking for administrators the day you reach retirement eligibility. If you wait after anniversary, you are losing money. At age 57 and 30 years – if you wait you only have the remaining 58 months to collect benefits
- First day of month following your anniversary begins clock ticking.

11:40 AM – Vern Crawford – Palm Beach/Monroe County Lobbyist. Gave updates on bills on *2006 Legislative Update #2* handout. Key bills:

HB 659 – Extension of DROP
 Sponsor Ralph Arza:
 Co Sponsor: Clary Senate Bill 1065

HB 389 - Re-employment
 Sponsor Bill Proctor
 Co-Sponsor: Stephen Wise, SB 102

HB 105 – HIS
 Sponsor Bob Allen
 Co-Sponsor Alfred Lawson

HB 481 – Allows school boards to use their \$2 mil capital funds to pay for property casualties and insurance.
 Sponsor Rep. Poppel
 Co-Sponsor is SB 412 by Mike Bennett

Graduated Retirement: has no traction in Tallahassee this year, but everyone seems to view it favorably. Senator Pruitt was staunch supporter three years ago.

Items to keep tabs on:

- Establishing relationships as FASA and local organization members. Develop partnerships.
- Stay tuned on A++ legislation.
- Follow calendar bills HB 177 and SB 306. Supported mostly by Busch Gardens and Disney. We worked hard to be able to finish first semester before holidays.
- “Break up the District” issue: No correlation can be found in Florida between smaller counties and big counties on FCAT, achievement, etc.
- Class Size Legislation and 65% Resolution: House Resolution 447 and Senate Resolution 1150. Push for definition up front. Remember the lottery!

12:00 – Lunch

12:40 – Juhan Mixon – FASA Lobbyist – “2006 Legislative Issues”

Two handouts were distributed: (1) *2005 Know Your Legislators* and (2) *Statewide Workshop on 2006 Florida Legislative Session*.

Politics dominate everything we do. We are controlled by politics and politicians, and in turn, we control politicians. Politicians are very concerned about what constituents think and write in local papers, etc.

How we can control what THEY do:

What is legislative lobbying? The ability to influence the outcome of any piece of legislation. Information is provided through **facts** and **anecdotes**. Unless they are your friend, they rely on facts. Everyone gives those facts – companies, parents, school districts, lobbyists, etc. No one knows education more than the constituents – so we provide them **facts** or **anecdotes** from our own experience. We need to (pages 11-12 of handout):

- Form relationships, bonds, with legislators so we can tell them what we do and need.
- Invite legislators out on non-work time to talk about issues.
- Learn or be able to find out who your House members and Senators are. Resources are available with pictures of legislators, information on which committees/councils they serve, etc.
- Contact legislators BEFORE they go to Tallahassee
- Lead with your best stuff.
- Know your information or get with an expert and learn it before you talk about it.
- Be a good listener; ask for their support before you leave.
- Letters and emails: Be brief when you write. They don’t want to be your pen pal.
- Check spelling and be sure of the address.
- Keep issues simple and outline issue at the beginning of your correspondence.
- When leaving messages, be brief and succinct.

- Meet with legislators in your counties to thank them for anything they've done. Be pleasant, brief, organized and focused on one point. Have only two or three issues to discuss, but then focus on the one or two that appear to move the furthest and are the most likely to pass.
- Follow through with thanks, public in your county.

Law of Unintended Consequences: Unexpected results legislators have to be aware of. *Example*: Jessica Lunsford Act

First person that sees a bill is the President or Speaker of the House. They can kill bills by assigning them to too many committees or never let it come up for a vote from the calendar. There are approximately 4,000 bills per session, with multiple parts. Only about 150 bills pass each session

Jim Warford, Executive Director, FASA on an Alert System: FASA office is working on coming up to speed technologically to be able to develop a communication system for quick alerts and response.

Meanwhile, powerful new technology is being looked at that would allow FASA to call your home phone or cell phone and survey you for a response to a stated issue. Want to be able to have a to-hour turnaround response time to critical, deadline issues.

- You would be able to push a number to respond to the survey and FASA could have survey results in minutes. Could arrange for responses to be anonymous.
- May be asking FASA members for their opinions on that type of survey system.
- Input was solicited from the group present. Some were hesitant about the idea of providing their cell phone numbers.
- When asked for a phone number, home or cell, the group was mostly in favor of providing numbers.

Legislative Days: Sunday, Monday & Tuesday, March 19th, 20th and 21st.

1:45 PM – John Miliziano, Executive Director, HASA

“Establishing Local Communications Networks”

- Start at local level. Form a legislative committee
- Build relationships – start now
- Become informed in legislative issues
- Establish effective communication networks within your organization/district
- Hire an Executive Director, even part-time at first if need be
- Establish a Political Action Committee
- Go back to your counties and wake up members to what you've learned
- Establish regional networks
- Conduct regional workshops
- Encourage membership in FASA
- Encourage regional networks of smaller counties.
- Do research – compare district information from across the state

Splitting districts: Hillsborough, for one, is not in favor. Could potentially be split into nine (9) separate smaller districts. John distributed a one page facts sheet.

Florida Retirement System – learn about your retirement system so you can effectively talk and lobby.

Vern Crawford – Palm Beach/Monroe County Lobbyist

This is an election year. 18 congressional representatives voted a third time to cut Perkins, to cut Staff Development, cut ESOL, and flat line Title I and flat line IDEA. But dollars are found for other things like Katrina, the space flight to Pluto, etc. We need to monitor how legislators vote and remember it.

Terry Aunchman distributed a workshop effectiveness survey for the participants.

John Miliziano offered to come to any county to speak, advice, etc.

2:10 PM - Jim Warford, Executive Director, FASA - Closing remarks

Why do school leaders have so little clout in Tallahassee relative to other organizations?
We divide ourselves. We need to come to consensus about what is important to school leaders. Put 100 issues on the table statewide and we will agree on 99. So where is the dissention?
We need to work together – not as “school leader” and “district leader”. Need to establish consensus.

FASA needs to know what members think statewide, in order to represent their needs and wants in Tallahassee. FASA is in the process of putting in place the tools to do it.

Percentage of members in FASA from local associations – needs to be looked at and addressed.

2:16 PM - Roundtable:

- Membership application for FASA is in handouts!
- Thanks for breakfast, lunch, and hosting.
- FRS presentation was outstanding!