

# Select Committee on Pension Policy

## Appendix C

### Agency Request Letters

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# Select Committee on Pension Policy

P.O. Box 40914  
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August 9, 2016

Ms. Anne Hall  
Senior Counsel  
Washington State Attorney General  
P.O. Box 40108  
Olympia, WA 98504

Dear Ms. Hall:

Consistent with the adoption of the 2016 Merger Study work plan at their June meeting, the Select Committee on Pension Policy (SCPP) formally requests the assistance of the Attorney General's Office (AGO) in completing the 2016 Merger Study, as required under Section 106 of Chapter 36, Laws of 2016. I believe the following information is consistent with our prior discussions, but please contact me if you have questions or concerns with any item.

Specifically, the SCPP is requesting that the AGO analyze the legal implications of a merger of the Law Enforcement Officers' and Fire Fighters' Plan 1 and the Teachers' Retirement System Plan 1, including any impacts at both the state and federal level, and report back to the SCPP as outlined below.

As you are aware, SCPP staff is conducting a stakeholder survey to help inform the analysis. We have shared a preliminary compilation of the results with you, and will forward a final version when complete (approximately mid-September). We encourage you to answer as many of the questions that relate to your area of expertise as time and resources allow.

In order to meet the required deadline of January 9, 2017, the SCPP asks that, at a minimum, you provide the following:

- ❖ A presentation updating the SCPP on your analysis at the SCPP meeting on October 18.

**Senator Barbara Bailey**

**John Boesenberg**  
*PERS/Higher Ed Employers*

**\*Representative Bruce Chandler, Vice Chair**

**\*Senator Steve Conway, Chair**

**Annette Creekpau**  
*PERS Employers*

**\*Randy Davis**  
*TRS Actives*

**\*Beverly Freeman**  
*PERS Employers*

**\*Marcie Frost, Director**  
*Department of Retirement Systems*

**\*Bev Hermanson**  
*PERS Retirees*

**Senator Steve Hobbs**

**Robert Keller**  
*PERS Actives*

**Representative Matt Manweller**

**Byron Olson**  
*PERS Employers*

**Representative Timm Ormsby**

**Senator Mark Schoesler**

**David Schumacher, Director**  
*Office of Financial Management*

**Representative Derek Stanford**

**J. Pat Thompson**  
*PERS Actives*

**Robert Thurston**  
*WSPRS Retirees*

**David Westberg**  
*SERS Actives*

*\*Executive Committee*

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Ms. Anne Hall  
August 10, 2016  
Page 2

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- ❖ A presentation of a preliminary draft of your full report at the SCPP meeting on November 15.
- ❖ A presentation of a final draft at the SCPP meeting on December 13.

Please contact SCPP staff if you have any questions or concerns with this request, the survey, or coordination with the SCPP.

Thank you for your assistance,



Aaron Gutierrez, MPA, JD  
Staff Coordinator  
Select Committee on Pension Policy

cc: Senator Steve Conway, Chair  
Select Committee on Pension Policy  
Representative Bruce Chandler, Vice Chair  
Select Committee on Pension Policy  
Matt Smith, FCA, EA, MAAA  
State Actuary

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# Select Committee on Pension Policy

P.O. Box 40914  
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state.actuary@leg.wa.gov

August 9, 2016

Mr. Steve Nelsen  
Executive Director  
LEOFF 2 Board  
P.O. Box 40918  
Olympia, WA 98504-0918

Dear Mr. Nelsen:

Consistent with the adoption of the 2016 Merger Study work plan at their June meeting, the Select Committee on Pension Policy (SCPP) formally requests the Law Enforcement Officers' and Fire Fighters' (LEOFF) Plan 2 Board's assistance in completing the 2016 Merger Study, as required under Section 106 of Chapter 36, Laws of 2016. I believe the following information is consistent with our prior discussions, but please contact me if you have questions or concerns with any item.

Specifically, the SCPP is requesting that the LEOFF 2 Board update OSA's 2011 Merger Study, which focused on a hypothetical merger of LEOFF 1 and LEOFF 2.

As you are aware, SCPP staff is conducting a stakeholder survey to help inform the analysis. We have shared a preliminary compilation of the results with you, and will forward a final version when complete (approximately mid-September). While the survey is predominantly geared toward the LEOFF 1/Teachers' Retirement System Plan 1 portion of the study, there are many LEOFF 2 questions, and a great many more that overlap between the two analyses. We encourage you to answer as many of the questions that relate to your area of expertise as time and resources allow.

In order to meet the required deadline of January 9, 2017, the SCPP asks that, at a minimum, you provide the following:

**Senator Barbara Bailey**

**John Boesenberg**  
*PERS/Higher Ed Employers*

**\*Representative Bruce Chandler, Vice Chair**

**\*Senator Steve Conway, Chair**

**Annette Creekpau**  
*PERS Employers*

**\*Randy Davis**  
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**\*Marcie Frost, Director**  
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Mr. Steve Nelsen

August 10, 2016

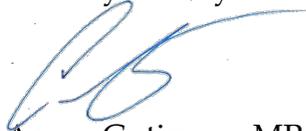
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- ❖ A presentation updating the SCPP on your analysis at the SCPP meeting on October 18.
- ❖ A presentation of a preliminary draft of your full report at the SCPP meeting on November 15.
- ❖ A presentation of a final draft at the SCPP meeting on December 13.

Please contact SCPP staff if you have any questions or concerns with this request, the survey, or coordination with the SCPP.

Thank you for your assistance,



Aaron Gutierrez, MPA, JD

Staff Coordinator

Select Committee on Pension Policy

cc: Kelly Fox, Chair  
LEOFF 2 Board  
Senator Steve Conway, Chair  
Select Committee on Pension Policy  
Representative Bruce Chandler, Vice Chair  
Select Committee on Pension Policy  
Matt Smith, FCA, EA, MAAA  
State Actuary

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# Select Committee on Pension Policy

P.O. Box 40914  
Olympia, WA 98504-0914  
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August 9, 2016

Mr. Jacob White  
Legal and Legislative Services Manger  
Department of Retirement Systems  
P.O. Box 48380  
Olympia, WA 98504-8380

Dear Mr. White:

Consistent with the adoption of the 2016 Merger Study work plan at their June meeting, the Select Committee on Pension Policy (SCPP) formally requests the assistance of the Department of Retirement Systems (DRS) in completing the 2016 Merger Study, as required under Section 106 of Chapter 36, Laws of 2016. I believe the following information is consistent with our prior discussions, but please contact me if you have questions or concerns with any item.

Specifically, the SCPP is requesting that DRS analyze the administrative implications of a merger of the Law Enforcement Officers' and Fire Fighters' Plan 1 and the Teachers' Retirement System Plan 1, including any impacts at both the state and federal level, and report back to the SCPP as outlined below. We understand there may be some overlap with the legal analysis (e.g., the tax implications), and we encourage you to communicate with the Attorney General's Office if there is any concern of duplicating analysis.

As you are aware, SCPP staff is conducting a stakeholder survey to help inform the analysis. We have shared a preliminary compilation of the results with you, and will forward a final version when complete (approximately mid-September). We encourage you to answer as many of the questions that relate to your area of expertise as time and resources allow.

**Senator Barbara Bailey**

**John Boesenberg**  
*PERS/Higher Ed Employers*

**\*Representative Bruce Chandler, Vice Chair**

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Aaron Gutierrez, MPA, JD  
Staff Coordinator  
Select Committee on Pension Policy

cc: Senator Steve Conway, Chair  
Select Committee on Pension Policy  
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