

## CANDIDATE QUESTIONNAIRE SUMMARY

During this last summer, the AMRPE Board developed a candidate questionnaire for those running for the Montana House and Senate. The questionnaire focused on issues relevant to the Public Employees Retirement System, particularly the current 3% GABA. Approximately 250 questionnaires were mailed and as of Sept. 19 (we requested all answers by Sept. 12), 65 responses have been returned. Those questions and responses were compiled in this Candidate Questionnaire Summary Report.

If you do not find a response from a particular candidate, this means they failed to respond to the questionnaire. We urge all interested parties to review the responses. If your representative did not answer our questions, feel free to contact them to ask the same questions we presented in the questionnaire.

### **Candidate Questions:**

- 1) Would you agree or disagree that state and local governments have an obligation to fulfill the retirement commitments made to their retired public employees?
- 2) After serving substantial amounts of time in public employment – often thirty years or more – do you agree or disagree that public employees deserve to receive the retirement benefits they were promised during the time they were employed?
- 3) Would you agree or disagree that any decreases made to the retirement benefits of public employees should be enacted only for those hired after such changes were made?
- 4) Would you be willing to support legislation restoring the 3% GABA provision to the levels public employees and retirees were entitled to prior to the effective date of House Bill 454?
- 5) What if anything to you plan to do as a legislator in regards to the public retirement system?

### **Responses**      A = Agree; D = Disagree; NR = No Response

L. Name	F. Name	District	Q. #1	Q. #2	Q. #3	Q. #4	Q #5
Coats	Donald	HD 01	A	A	A	Yes	
Benson	Steven	HD 02	A	A	A	Yes	Look to secure future funding in order to maintain attractive benefit packages.
Perry	Zac	HD 03	A	A	A	Yes	As a legislator, I will do everything I can to restore and protect the public retirement system.
Lieser	Ed	HD 04	A	A	A	Yes	Should I get elected, I will vote to restore the GABA to 3.0 for employees hired prior to 2007 and encourage my colleagues to do the same.
Achatz	Weylin	HD 13	A	A	A	Yes	Gather further information AMRPE and do what I can to assist their cause.
Jacobson	Tom	HD 21	A	A	A	Yes	I will continue to support our public employees both past and present.
Mehlhoff	Robert "Bob"	HD 22	A	A	A	Yes	I am planning no bills in this area.
Salley	Earl	HD 23	A	A	A	Yes	Foremost keep it solvent also keep it a benefit that will attract and retain competent employees.

Price	Jean	HD 24	A	A	A	Yes	I would sponsor and support the restoration of the GABA provision to all levels of public employees and retirees.
Trethewey	Janet M.	HD 28	A	A	A	Yes	I hope to work to restore the MPERA funding to levels agreed to and make it fiscally sound. Both my husband and I are members of PERS. He's a firefighter and me thru the City of Havre.
Moody	Ron	HD 29	A	A	A	Yes	I will support legislation to restore the above-stated proposition.
Brockie	Clarena M.	HD 32	A	A	A	Yes	Support it
Knotts	Rob	HD 35	A	A	A	Yes	
Hansen	Edward W.	HD 36	A	A	A	Yes	I want a livable wage for all public employees. The retirement is a vested program that is very important to current retirees and those currently employed. This is one of the reasons for my entering the race.
Custer	Geraldine	HD 39	A	A	A	Yes	I am a retiring 36 year county clerk and recorder and I can't tell you how many years we worked for poor wages and stayed in public sector because of the retirement so it was a total slap in the face last session. I am 100% on board to get and keep it restored for those of us hired and working during that time!
Berry	Tom	HD 40	D with 3% GABA	A		No	I voted for HB454, everyone gave in a little to shore up the PERS retirement. Then the retirees file this lawsuit. Selfish. If I had to do it over again, I would have voted against HB454. Ever since I voted for HB454, the Teachers Retirement and the employee pay raise I've been branded a liberal. But the retirees don't seem to care about legislators who stick up for them as long as they get everything at the expense of legislators like me.
Pease-Lopez	Carolyn	HD 42	A	A	A	Yes	Though not proposing any bills that address this issue, I would support measures that would protect pensions for MT public service retirees.
Wong	Sandy	HD 44	A	A	A	A	...HB 454 was beneficial in correcting the actuarial deficit...but was not equitable ...by not grandfathering in benefits at the previous level for those employees hired/retired under previous terms. If the court decision ...lands this issue back before the legislature I am in favor of restoring the BABA provisions prior to the effective date of HB 454.
Hasiak	Cory	HD 49	A	A	I believe with \$4-6 billion shortfall for pension funding, will need to make corrections now.	No. This won't be resolved until after trial. Retired individuals and those close to retirement should receive promised benefits.	This must be over-hauled for new employees and those between 40-45 and less. We cannot afford current plans and must convert to more of employee driven plan 403(b) or similar option.

							Support legislation that protects retirement benefits for retired state employees.
Court	Virginia	HD 50	A	A	A	Yes	
MacDonald	Margie	HD 51	A	A	A	Yes	I will support our obligations to our public retirees.
Goodridge	Chris	HD 52	A	A	A	Yes	I will support measures to increase funding to fulfill obligations to contractual retirement agreements.
Huf	Michael	HD 57	A	A	A	Yes	1) look into coal trust fund for funding PERS; 2) look into higher personal contributions for new hires; 3) research a 401K concept.
White	Kerry	HD 64	A	A	A	I support DC and oppose DB for new hires	Reform benefit package for new hires to make retirement sustainable. Everyone loses if system goes broke.
Johnson	Ed	HD 66	A	A	A	Yes	Help return it to previously promised levels and ensure that public employees receive what they were guaranteed and what they put into the fund comes back to them.
Clark	Marla	HD 70	A	A	A	Yes	First, make sure it stays funded. Second, make sure contractual agreements are adhered to. I will vote against anything that tries to subvert the pension system.
Lester	Johanna	HD 71	A	A	A	Yes	As a participant in the PERS from past country employment, I would fight to preserve the benefits promised at the time of employment. I think it is wrong to decrease what was promised and therefore, planned on for retirement.
Driscoll	John Michael	HD 74	A	A	A	Yes	I would support the retired public employees. My mother was a retired public health nurse and my dad was a retired school teacher.
Keeler	Kevin	HD 75	A	A	A	Yes	See letter
Eck	Jenny	HD 79	A	A	A	Yes	I will support all of the above and help out in any way I can. I'm not an expert in this field, but I am very receptive to ideas from you in ways that I can help. I believe in making sure that public employees receive the retirement benefits that they were promised. We also need to make sure that incoming public employees are offered good retirement packages so that we can recruit and retain an excellent work force.
Vandevender	Ron	HD 80	A	A	A	Yes	Work to get the state retirement fund fully funded will be my main goal and to raise retirement benefit levels.
Ellis	Janet	HD 81	A	A	A	Yes	I am not an expert on this topic. I've met with Diane Fladmo of MEA-MFT to learn about pensions. I would be willing to support restoring the GABA. In addition, I understand that the sheriff's and game warden's pension systems need to be made more financially sound. I would be interested in working on/supporting making these two plans financially sound.

Pardis	Michael H.	HD 81	A	A	A	I would need to look at the entirety of the bill proposed.	Increase investment returns while lowering risk and expenses. Montana is contractually obligated for past benefits to state employees. The state also needs to increase funding from current 67% to 80%. But how is the \$64,000 question!!
Funk	Moffie	HD 82	A	A	A	Yes	I would hope that I could work closely with AMRPE, MEA-MFT and any other entities that would advance the causes we all support: workers, compensation, security and health.
Dunwell	Mary Ann	HD 84	A	A. I think this should apply to the private sector as well.	A	Yes	I will work hard to propose and advance policies that protect the pensions of public employees and their quality of life. They've worked hard all their lives to do the work of the people and to protect quality of life. They deserve no less than the promises we made.
Gibso	Steven	HD 84	A	A	A	Yes	Continue to ensure that public employees retain the defined benefit, as I have done the past two sessions.
Manzella	Theresa	HD 85	A	A	A	NR	NR
Schneider	Nancy A.	HD 86	A	A	A	Yes	Apologies for taking so long to get this back to you. I've been busy knocking on doors approx 1700 so far! I would love to hear more the ways that I could help as a legislator.
O'Leary Houtchens	Erin	HD 87	A	A	A	Yes	Support the workers against big business and political agendas.
McConnell	Nate	HD 89	A	A	A	Yes	I will protect workers and retirees to the greatest extent possible.
Strohmaier	Dave	HD 92	A	A	A	Yes	...being a good steward of the public trust..keeping ones promises, supporting defined benefit plans, restoring GABA and listening to concerns...My door is open! ...concerned about keeping health care affordable for retirees.
Moore	David "Doc"	HD 92	A	A	A	not sure	Concerned about what is happening in Detroit and what that could mean for other states. As a PERS pensioner, of course I want to do what is needed to keep state pensions on solid financial footing.
Dudik	Kimberly	HD 94	A	A	A	Yes	I plan to vote to support the retirement benefits public employees deserve.
Geer	Bill	HD 97	A	A	A	Yes	Advocate and vote for legislation and co-sponsor or originate such legislation favorable to public employees retirement. I was in the Utah Public Employees Association when I was with Utah Division of Wildlife Resources.
Seewald	Roger	HD 98	A	A	A	There needs to be some review of what the GABA should be yearly-not just a fixed percentage.	Work with AMRPE to review and discuss the entire retirement program along with current working benefits

Curdy	Willis	HD 98	D	A	A. with some serious concerns about reducing benefits or obligations to future hirees.	Yes	1. stop any efforts to reduce or diminish Montana's obligation to its retirees. 2. seek additional revenue (general fund) to support the state's retirement systems. 3. work with AMRPE to solve concerns that Montana's retirees have. 4. not overburden or diminish retirement obligations to our future state employees. TRS retiree!!
Steenberg	Tom	HD 99	A	A	A	X For those employees already covered under GABA i.e. hired before HB 454.	Support public employees and maintain healthy, actuarially funded systems. Retired firefighter; FURS member.
King	Daniel S.	SD 05	A	A	A	Yes	The state entered into a sacred contract with public employees, who dedicated their adult lives to performing their duties. An important part of that contract is the retirement system. I will do all that is necessary to support and maintain that contract.
Brown	Vonnie	SD 11	A	A	A	Probably but I would want to do more research on this.	I will collaborate with all parties to do what we can to strengthen, stabilize and fund the public retirement system.
Sheehy Moe	Mary	SD 12	A	A	A	Yes	I am a retired public employee myself (TRS)-I understand and support your take on the issues. I will follow your issues closely.
Hoven	Brian	SD 13	A	A	A	Yes	Change the plan for new hires from Defined Benefit to a hybrid plan similar to Joe Balyeats bill in the 2012 session.
Boland	Carlie	SD 13	NR	NR	NR	NR	As in the past, I will continue to support our public employees. I did not fill out the questionnaire but you can check my voting record to see my support.
Jergeson	Greg	SD 14	A	A	A. Though I generally would not want to reduce retirement benefits for new hires either.		I would make strategic use of one-time only revenues to reduce the unfunded liability of the retirement systems.
Johnson	Eric	SD 27	A	A	A	Yes	I would support legislation that would make it mandatory to honor all promises made to public employees concerning their retirement.
Wilmer	Franke	SD 32	A	A	A	Yes	Carry any bills you ask me to carry. Work with Mike O'Connor on any issues of concern to you. Fight against privatization of public employee retirement systems. Sponsor a bill to put 911 Dispatchers on shorter timeline to retirement. (Same as sheriffs)
Hinkle	Jedediah	SD 32	A	A	A	NR	I need more information on the matter to accurately assess. Public retirement in Montana is not easy solution but I would be happy to learn possible solutions and address the matter from there.

Pomnichowski	Jennifer "JP"	SD 33	A	A	A	Yes	I was proud to vote for changes to PERS in the 2013 session to make the fund fiduciarily sound and to significantly shorten the amortization period. I'll continue to support reitirement benefits; they're part of your employment contract.
Buonamici	April	SD 34	A	A	NR	NR	...the system needs to be "fully vested" meaning retirement money comes from investments and investment earnings from that employee. Currently retirement monies come from those now working. This will rewuire some "catch up" investing that should come from the state - such as the \$400m surplus we had in2012 Once the system is "fully funded" the GABA should be tied to yearly inflation...i.e. if inflation is1.5% , that is the GABA, if 4%, that is the GABA.
Cohenour	Jill	SD 42	A	A	A	Yes	I will work hard to preserve the promise made by the Govt to their workers to provide retirment benefits that allow dignity and economic security in retirement.
Dooling	Joe	SD 42	A	A	A	Yes	It has to be solvent; anything less would be irresponsible.
Schumacher	Robert	SD 43	A	A	A. No decreases	Yes	Change funding to correct actuarial deficit.
Wolken	Cynthia	SD 48	A	A	A	Yes	This is a values based issue for me. I confronted this issue serving on the Missoula City Council. We must talk about the value our public employees provide and that a race to the bottom hurts both public and private sector empoloyees. I plan on elevating the debate whenever possible.
Sands	Diane	SD 49	A	A	A	Yes	I am a retired PERS. While I don't serve on SAVA or Approps I have always voted for public employees and always will.
Facey	Tom	SD 50	A	What time when they entered service or the last 3 years of their service?	A	Yes	Nothing--just protect the bills/ideas we passed in 2013.