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Department of Employee Trust Funds

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**CORRESPONDENCE MEMORANDUM**

**DATE:** February 26, 2004  
**TO:** Employee Trust Funds Board  
Teachers Retirement Board  
Wisconsin Retirement Board  
**FROM:** Vicki Poole, Director of Legislation and Planning  
**SUBJECT:** Legislative Report

The following is an update of bills introduced during the 2003 legislative session. Following the description of each bill is a summary of action taken.

**AB 75** classifies employees of the Department of Military Affairs who perform security functions at weapons facilities owned by the state as protective occupation participants under the WRS.

*Introduced by Rep. Musser. Referred to Joint Survey Committee on Retirement Systems 2/18/03.*

**AB 76** classifies teachers and librarians employed at state correctional institutions, secured correctional facilities, the Mendota and Winnebago mental health institutes, the Wisconsin Resource Center, or any secure mental health unit or facility for sexually violent persons as protective occupation participants under WRS.

*Introduced by Rep. Musser. Referred to Joint Survey Committee on Retirement Systems 2/18/03.*

**AB 77** provides that a participating employee in the WRS who terminates covered service on or after the effective date of the bill may receive creditable military service (under certain conditions) for active military service served at any time.

*Introduced by Rep. Musser. Referred to Joint Survey Committee on Retirement Systems 2/18/03.*

**AB 262** authorizes cities, towns and villages to create combined protective services departments.

*Introduced by Rep. Ziegelbauer. Referred to Committee on Urban and Local Affairs. Public hearing held 10/07.*

Board	Mtg Date	Item #
JI	3/25/2004	2

**AB 454** provides that ETF must make records containing the name of a participant who holds, or held, an elective or major appointive state or local office, together with the amount of any retirement annuity that is paid or projected to become payable to the participant, available for public inspection and copying.

*Introduced by Rep. Gundrum. Referred to Committee on Government Operations and Spending Limitations 8/04/03.*

**AB 537** (same as SB 260) creates a venture capital investment trust in the public employee trust fund and permits participating employees in the WRS to allocate retirement contributions in venture capital.

*Introduced by Rep. Nischke. Public hearing held on bill draft 9/25. Referred to Committee on Economic Development. Report of Joint Survey Committee on Retirement Systems requested 9/25/03.*

**AB 599** provides that a participating employer in the WRS covered by the Municipal Employment Relations Act (MERA) may not pay the first 3% of employee-required contributions that the participating employee is required to pay under the WRS.

*Introduced by Rep. Gottlieb. Referred to Committee on Labor. Report of Joint Survey Committee on Retirement Systems requested 10/16/03.*

**AB 638** (same as AB 674) allows payment of health insurance premiums for rehired annuitants under the WRS who become employed by the State.

*Introduced by Rep. Jeskewitz. Referred to Joint Survey Committee on Retirement Systems 11/05/03.*

**AB 674** (same as AB 638) allows payment of health insurance premiums for rehired annuitants under the WRS who become employed by the State.

*Introduced by Rep. Jeskewitz. Referred to Committee on Insurance. Public hearing held. Passed committee w/substitute amendment 8-6. Referred to Joint Committee on Finance 1/21/04.*

**AB 692** (same as SB 344) eliminates percentage threshold for increases in fixed annuities.

*Introduced by Rep. Vrakas. Referred to Joint Survey Committee on Retirement Systems. Public hearing held 1/20. Passed w/substitute amendment (setting threshold at .5% for both increases and decreases in fixed annuity payments). Referred to Committee on Government Operations. Public hearing held. Passed committee 2/25/04.*

**AB 820** provides that any WRS participant who at the time of death was a participating employee, who died between 1/1/99 and 12/31/99, shall have his or her death benefit retroactively increased.

*Introduced by Rep. Cullen. Referred to the Joint Survey Committee on Retirement Systems 2/05/04.*

**SB 91** limits participation in WRS to supreme court justices, court of appeals judges, circuit court judges and state elected officials whose initial terms of office were before the bill's effective date.

*Introduced by Sen. Reynolds. Referred to Joint Survey Committee on Retirement Systems 4/02/03.*

**SB 93** credits certain prior service in the U.S. maritime services in the WRS.

*Introduced by Sen. Erpenbach. Referred to Joint Survey Committee on Retirement Systems 4/02/03.*

**SB 166** allows participation in the WRS for teaching assistants and project assistants employed by the UW System.

*Introduced by Rep Risser. Referred to Joint Survey Committee on Retirement Systems 5/14/03.*

**SB 260** (same as AB 537) creates a venture capital investment trust in the public employee trust fund and permits participating employees in the WRS to allocate retirement contributions in venture capital.

*Introduced by Sen. Kanavas. Public hearing held. Referred to Joint Survey Committee on Retirement Systems 9/24/03.*

**SB 285** (same as AB 599) provides that a participating employer in the WRS covered by the Municipal Employment Relations Act (MERA) may not pay the first 3% of employee-required contributions that the participating employee is required to pay under the WRS.

*Introduced by Sen. Brown. Referred to Joint Survey Committee on Retirement Systems 10/15/03.*

**SB 344** (same as AB 692) eliminates percentage threshold for increases in fixed annuities.

*Introduced by Sen. Schultz. Referred to Joint Survey Committee on Retirement Systems. Public hearing held. Passed 10-0 w/substitute amendment (setting threshold at .5% for both increases and decreases in fixed annuity payments). Referred to Committee on Labor. Passed on 1/29/04. Passed Senate on voice vote on 2/26/04. Passed Assembly on a vote of 95-3 on 3/10/04. The bill awaits signature by the Governor.*

**SB 386** (same as 2001 SB 403 and AB 775) increases WRS benefits of educational support personnel employees.

*Introduced by Sen. Risser. Referred to Joint Survey Committee on Retirement Systems 1/14/04.*

**SB 412** requires Board members to be covered under codes of ethics.

*Introduced by Sen. Reynolds. Referred to Committee on Labor. Passed on 1/29/04. Passed Senate on voice vote on 3/4/04.*