

Government Operations Subcommittee

Tuesday, January 31, 2012 9:00 AM Morris Hall (17 HOB)

Amended Action Packet

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

Summary:

Government Operations Subcommittee

Tuesday January 31, 2012 09:00 am

HB 337 Favorable	Yeas: 12 Nays: 0
HB 395 Favorable	Yeas: 13 Nays: 0
HB 469 Favorable	Yeas: 13 Nays: 0
HB 525 Favorable With Committee Substitute	Yeas: 7 Nays: 6
HB 605 Favorable	Yeas: 13 Nays: 0
CS/HB 897 Favorable	Yeas: 12 Nays: 0
CS/HB 971 Favorable	Yeas: 10 Nays: 3
HB 1089 Favorable With Committee Substitute	Yeas: 14 Nays: 0
HB 1105 Favorable	Yeas: 13 Nays: 0
CS/HB 1211 Favorable	Yeas: 13 Nays: 0
HB 1301 Favorable	Yeas: 13 Nays: 0
HB 1325 Favorable	Yeas: 13 Nays: 0
HB 1339 Favorable With Committee Substitute	Yeas: 13 Nays: 0
HB 1461 Favorable	Yeas: 9 Nays: 4
HB 1479 Favorable	Yeas: 12 Nays: 0
CS/HB 1481 Favorable	Yeas: 13 Nays: 0
PCS for HB 365 Favorable	Yeas: 7 Nays: 6

Draft legislation amending section 288.075, Florida Statutes, which provides public record exemptions for economic development agencies Workshopped

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

Print Date: 1/31/2012 4:13 pm

AMENDED

Attendance:

	Present	Absent	Excused
Jimmy Patronis (Chair)	Х		
Larry Ahern	X		
Douglas Broxson	. X		
Jeff Clemens	X		
Janet Cruz	X		
Ana Logan	X		
Debbie Mayfield	X		
George Moraitis, Jr.	X		
Bryan Nelson	X		
H. Marlene O'Toole			Χ
Kenneth Roberson	X		
Irving Slosberg	X		
Cynthia Stafford	X		
Barbara Watson	X		
Dana Young	X		
Totals:	14	0	1

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 337: Public-Private Partnerships

X	Favorable

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan			Х		
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		-
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	Х				
	Total Yeas: 12	Total Nays: 0			

Appearances:

Public-Private Partnerships
Bernardino, Frank (Lobbyist) - Proponent
Florida Water Advocates
324 E. Virginia Street
Tallahassee FL 32301
Phone: 561-718-2345

C. Scott Dudley (Lobbyist) - Waive In SupportFlorida League of Cities301 S. BronoughTallahassee FL

Phone: 850-222-9684

Public-Private Partnerships
Watson, Richard (Lobbyist) - Proponent
Builders Notice Corporation
P.O. Box 10038
Tallahassee FL 32302
Phone: (850)222-0000

Support of Williams Bill 337 Hansen, Chris (Lobbyist) - Waive In Support Associated Builders & Contractors Tallahassee FL 32301

Tallahassee FL 32301 Phone: 850-577-9090

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 337 : Public-Private Partnerships (continued)

Appearances: (continued)

CCNA Exemption
Lanier Mathews - Opponent
Florida Surveying & Mapping Society
4464 Luminous Lane
Tallahassee FL

Phone: 850-519-7466

Print Date: 1/31/2012 4:13 pm

Public-Private Partnerships
Perdue, Tamela (Lobbyist) - Waive In Support
Associated Industries of Florida
516 N. Adams Street
Tallahassee FL 32301
Phone: (850)224-7173

Leagis ®

Page 4 of 28

AMENDED

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 395: Official State Designations

X Favorable

	Yea -	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				-
Ana Logan			Х		
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			х		
Kenneth Roberson	X				
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0)		

Appearances:

Support Broxson bill 395 Hansen, Christopher (Lobbyist) - Waive In Support City of Key West Tallahassee FL 32301

Phone: (850)577-9090

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 469 : Special Observances

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X.				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				

Appearances:

Purple Heart Day Holmich (Lobbyist) - Waive In Support VFW/American Legion 303 Johns Drive Tallahassee FL 32301

Purple Heart

Haynes, John - Waive In Support
Major USMC (Retired)/Florida Veterans Foundations

FL

Phone: 850-443-3451

Director of Legislative Cabinet Affairs Brodie, Jim (Lobbyist) - Waive In Support Department of Veterans' Affairs 4040 Esplanade Way Ste 152 Tallahassee FL 32399-0950 Phone: (850)487-1533

Purple Heart

Holland, Jim (General Public) - Proponent

Post Dept. Cdr Military Order of the Purple Heart

2985 Gwerny Drive Tallahassee FL 32309 Phone: 850-575-9576

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 469: Special Observances (continued)

Appearances: (continued)

Lecroy, Charles (General Public) - Waive In Support American Legion 459 Barineau Road

Tallahassee FL 32304 Phone: (850) 575-9234

Ford, Mike - Proponent Purple Heart/DAV 3093 Killearn Pt.Ct Tallahassee FL 32312 Phone: 850893-6257

Thomas, Cleveland, Jr. - Proponent

MOPH

P.O. Box 637

Sneads FL 32460-0637 Phone: 850-593-6923

Print Date: 1/31/2012 4:13 pm

Leagis ®

Page 7 of 28

AMENDED

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB) **AMENDED**

HB 525 : Florida Retirement System

Favorable With Committee Substitute

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
Jeff Clemens		X			
Janet Cruz		X			
Ana Logan			X		
Debbie Mayfield	X				
George Moraitis, Jr.		X			
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson	X				
Irving Slosberg		Х			
Cynthia Stafford		X			
Barbara Watson		X			
Dana Young	X				
Jimmy Patronis (Chair)	Х				
	Total Yeas: 7	Total Nays: 6			

Appearances:

FRS

Puckett, Matthew (Lobbyist) - Proponent Florida Police Benevolent Association, Inc 300 E Brevard St Tallahassee FL 32301

Phone: (850)222-3329

Bolin, Marty - Waive In Opposition **FPF** 806 SW El Prado

Lake City FL 32025 Phone: 386-719-9133

FRS

Sandlin, Brett - Waive In Opposition Fire Rescue Prof. of Alachua County 1949 NE 27th Ave Gainesville FL 32609

Phone: 352-535-5342

FRS

Dix, Walter - Opponent **Broward County Firefighters** 2650 W. St. Rd. 84 Ft. Lauderdale FL 33312

Phone: 954-587-3333

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 525 : Florida Retirement System (continued)

Appearances: (continued)

Spence, Richard - Waive In Opposition Reedy Creek Firefighters 6303 Abbeydale Ct. Orlando FL 32818

Phone: 404-595-4579

Dietrich, Eric (State Employee) - Waive In Support Captain, Volusia County Sheriff's Office & FSA 123 W Indiana Ave Deland FL 32720 Phone: 386-736-5999

McCrystal, Darrel - Waive In Opposition Florida Professional Fire Fighters

Goodwin, Lori - Opponent Fraternal Order of Police Milton FL

Henning, Lisa (Lobbyist) - Waive In Opposition Florida Fraternal Order of Police 242 Office Plaza Dr Tallahassee FL 32301 Phone: (850)656-9881

Perez, Andre (Lobbyist) - Waive In Opposition Orange County Prof. Fire Fighters L2057/FL. Prof. Fire Fighters 6828 Hanging Moss Rd Orlando FL 32807 Phone: 321-276-4719

Default to Investment Plan Edson, Linda (General Public) - Opponent Florida Retired Educators Association 1841 Myrick Rd. Tallahassee FL 32303 Phone: 850-385-3196

Pension; State Retirement System Sanchez, Robert F. - Information Only The James Madison Institute 2017 Delta Boulevard Tallahassee FL 32303

Phone: 850-386-3131

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 525 : Florida Retirement System (continued)

Appearances: (continued)

FRS

Vroman, Kurt - Waive In Opposition 9th District Fire Fighters 318 Colombia Rd DeBary FL 32713 Phone: 386-235-6765

Rowan, Taylor - Opponent Miami-Dade Fire Fighters 8000 NW 21st St. Miami FL

Florida Retirement
Parkerson, Dean - Opponent
South Florida Council of Fire Fighters
8000 NW 21st St. #205
Miami FL 33122
Phone: 305-525-6250

FRS

Suarez, Robert - Opponent Florida Professional Fire Fighters 345 W. Madison Street Tallahassee FL

Pensions

Templin, Rich (Lobbyist) - Opponent Florida AFL-CIO 135 S. Monroe Tallahassee FL 32301 Phone: 850-224-6926

Holobinko, Michael - Waive In Opposition S.W. Florida Professional Fire Fighters and Paramedics, IAFF 2030 West 1st Street Suite C Ft. Myers FL 33901 Phone: 239-334-8222

FRS

Messersmith, Frank (Lobbyist) - Proponent Florida Sheriffs Association 2901 Lake Bradford Road Tallahassee FL 32301 Phone: (850) 576-5858

Adams, Leticia (Lobbyist) - Proponent Florida Chamber of Commerce 136 S. Bronough St. Tallahassee FL 32301 Phone: (850) 521-1279

Print Date: 1/31/2012 4:13 pm

Leagis ®

Page 10 of 28

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 525 : Florida Retirement System (continued)

Appearances: (continued)

Print Date: 1/31/2012 4:13 pm

Florida Retirement System
Tolley, Jim (Lobbyist) - Opponent
Florida Prof Fire Fighters
345 West Madison St
Tallahassee FL 32301

Mattingly, Dwight (General Public) - Waive In Opposition Amalgamated Transit union Legislative Conference Bd. 8907 SE Pine Cone Lane Hobe Sound FL 33455 Phone: 561-523-0525

Leagis ®

Page 11 of 28

AMENDED

1 2

3

5

6 7

8

9

10

11

12

13

1415

16

17

18

19

COMMITTEE/SUBCOMMITTEE	ACTION
ADOPTED	(Y/N)
ADOPTED AS AMENDED	(Y/N)
ADOPTED W/O OBJECTION	(Y)
FAILED TO ADOPT	(Y/N)
WITHDRAWN	(Y/N)
OTHER	

Committee/Subcommittee hearing bill: Government Operations Subcommittee

Representative Workman offered the following:

Amendment (with title amendment)

Remove everything after the enacting clause and insert:
Section 1. Subsection (29) and paragraph (b) of subsection
(45) of section 121.021, Florida Statutes, are amended, and
paragraph (c) is added to subsection (45) of that section, to
read:

- 121.021 Definitions.—The following words and phrases as used in this chapter have the respective meanings set forth unless a different meaning is plainly required by the context:
- (29) "Normal retirement date" means the date a member attains normal retirement age and is vested, which is determined as follows:
- (a) 1. If a Regular Class member, a Senior Management Service Class member, or an Elected Officers' Class member initially enrolled:

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 1 of 40

1		Before	Julv	1.	2011:
-	•	202020	~ ~ ~ y	<i> </i>	

- a. The first day of the month the member attains age 62; or
- b. The first day of the month following the date the member completes 30 years of creditable service, regardless of age.
- 2. If a Regular Class member, a Senior Management Service Class member, or an Elected Officers' Class member initially enrolled On or after July 1, 2011:
- a. The first day of the month the member attains age 65; or
- b. The first day of the month following the date the member completes 33 years of creditable service, regardless of age.
 - (b) 1. If a Special Risk Class member initially enrolled:
 - 1. Before July 1, 2011:
- a. The first day of the month the member attains age 55 and completes the years of creditable service in the Special Risk Class equal to or greater than the years of service required for vesting;
- b. The first day of the month following the date the
 member completes 25 years of creditable service in the Special
 Risk Class, regardless of age; or
- c. The first day of the month following the date the member completes 25 years of creditable service and attains age 52, which service may include a maximum of 4 years of military service credit if such credit is not claimed under any other system and the remaining years are in the Special Risk Class. 210657 Strike-all.Workman.docx

Published On: 1/30/2012 6:56:25 PM

- 2. If a Special Risk Class member initially enrolled On or after July 1, 2011:
 - a. The first day of the month the member attains age 55 60 and completes the years of creditable service in the Special Risk Class equal to or greater than the years of service required for vesting;
 - b. The first day of the month the member attains age 50 and following the date the member completes 25 30 years of creditable service in the Special Risk Class, regardless of age; or
 - c. The first day of the month following the date the member completes $\underline{25}$ $\underline{30}$ years of creditable service and attains age $\underline{52}$ $\underline{57}$, which service may include a maximum of 4 years of military service credit if such credit is not claimed under any other system and the remaining years are in the Special Risk Class.

For pension plan members, "normal retirement age" is attained on the "normal retirement date." For investment plan members, normal retirement age is the date a member attains his or her normal retirement date as provided in this section, or the date a member is vested under the investment plan as provided in s. 121.4501(6), whichever is later.

(45) "Vested" or "vesting" means the guarantee that a member is eligible to receive a future retirement benefit upon completion of the required years of creditable service for the employee's class of membership, even though the member may have terminated covered employment before reaching normal or early 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 3 of 40

retirement date. Being vested does not entitle a member to a disability benefit. Provisions governing entitlement to disability benefits are set forth under s. 121.091(4).

- (b) Any member initially enrolled in the Florida
 Retirement System on or after July 1, 2011, <u>but before July 1,</u>
 2012, shall be vested <u>in the pension plan</u> upon completion of 8 years of creditable service.
- (c) Any member initially enrolled in the Florida

 Retirement System on or after July 1, 2012, shall be vested in the pension plan upon completion of 11 years of creditable service.
- Section 2. Paragraph (f) of subsection (1) and paragraph (e) of subsection (6) of section 121.055, Florida Statutes, are amended to read:
- 121.055 Senior Management Service Class.—There is hereby established a separate class of membership within the Florida Retirement System to be known as the "Senior Management Service Class," which shall become effective February 1, 1987.

(1)

- (f) Effective July 1, 1997:
- 1. Except as provided in subparagraph 3., an elected state officer eligible for membership in the Elected Officers' Class under s. 121.052(2)(a), (b), or (c) who elects membership in the Senior Management Service Class under s. 121.052(3)(c) may, within 6 months after assuming office or within 6 months after this act becomes a law for serving elected state officers, elect to participate in the Senior Management Service Optional Annuity

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Program, as provided in subsection (6), in lieu of membership in the Senior Management Service Class.

- 2. Except as provided in subparagraph 3., an elected officer of a local agency employer eligible for membership in the Elected Officers' Class under s. 121.052(2)(d) who elects membership in the Senior Management Service Class under s. 121.052(3)(c) may, within 6 months after assuming office, or within 6 months after this act becomes a law for serving elected officers of a local agency employer, elect to withdraw from the Florida Retirement System, as provided in subparagraph (b)2., in lieu of membership in the Senior Management Service Class.
- 3. A retiree of a state-administered retirement system who is initially reemployed in a regularly established position on or after July 1, 2010, as an elected official eligible for the Elected Officers' Class may not be enrolled in renewed renew membership in the Senior Management Service Class or in the Senior Management Service Optional Annuity Program as provided in subsection (6), and may not withdraw from the Florida Retirement System as a renewed member as provided in subparagraph (b)2., as applicable, in lieu of membership in the Senior Management Service Class.

(6)

- (e) Benefits.-
- 1. Benefits under the Senior Management Service Optional Annuity Program are payable only to members of the program, or their beneficiaries as designated by the member in the contract with the provider company, and must be paid by the designated company in accordance with the terms of the annuity contract 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 5 of 40

- a. A lump-sum payment to the beneficiary upon the death of the member;
- b. A cash-out of a de minimis account upon the request of a former member who has been terminated for a minimum of 6 calendar months from the employment that entitled him or her to optional annuity program participation. Such cash-out must be a complete liquidation of the account balance with that company and is subject to the Internal Revenue Code;
- c. A mandatory distribution of a de minimis account of a former member who has been terminated for a minimum of 6 calendar months from the employment that entitled him or her to optional annuity program participation as authorized by the department; or

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 6 of 40

- d. A lump-sum direct rollover distribution whereby all accrued benefits, plus interest and investment earnings, are paid from the member's account directly to the custodian of an eligible retirement plan, as defined in s. 402(c)(8)(B) of the Internal Revenue Code, on behalf of the member.
- 2. Under the Senior Management Service Optional Annuity Program, benefits, including employee contributions, are not payable for employee hardships, unforeseeable emergencies, loans, medical expenses, educational expenses, purchase of a principal residence, payments necessary to prevent eviction or foreclosure on an employee's principal residence, or any other reason except a requested distribution for retirement, a mandatory de minimis distribution authorized by the administrator, or a required minimum distribution provided pursuant to the Internal Revenue Code before termination from all employment relationships with participating employers for 3 calendar months.
- 3. The benefits payable to any person under the Senior Management Service Optional Annuity Program, and any contribution accumulated under such program, are not subject to assignment, execution, or attachment or to any legal process whatsoever.
- 4. Except as provided in subparagraph 5., a member who terminates employment and receives a distribution, including a rollover or trustee-to-trustee transfer, funded by employer and required employee contributions is a retiree of deemed to be retired from a state-administered retirement system. A retiree of a state-administered retirement system who is initially

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

re	employ	ed :	<u>in a</u>	regularl	y estal	olished po	<u>osit</u>	ion on o	or after	July
1,	2010,	is	not	eligible	to be	enrolled	in	renewed	membersh	ip if
th	e memb	e r :	is s t	ıbsequent	ly emp	loyed wit	n an	employ	e r that	
pa	rticip	ate	s in	the Flor	ida Re	tirement (Syst	em.		

5. A member who receives optional annuity program benefits funded by employer and employee contributions as a mandatory distribution of a de minimis account authorized by the department is not considered a retiree.

As used in this paragraph, a "de minimis account" means an account with a provider company containing employer and employee contributions and accumulated earnings of not more than \$5,000 made under this chapter.

Section 3. Paragraph (a) of subsection (3) and paragraph (a) of subsection (4) of section 121.091, Florida Statutes, are amended to read:

121.091 Benefits payable under the system.—Benefits may not be paid under this section unless the member has terminated employment as provided in s. 121.021(39)(a) or begun participation in the Deferred Retirement Option Program as provided in subsection (13), and a proper application has been filed in the manner prescribed by the department. The department may cancel an application for retirement benefits when the member or beneficiary fails to timely provide the information and documents required by this chapter and the department's rules. The department shall adopt rules establishing procedures for application for retirement benefits and for the cancellation

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 8 of 40

213

214

215

216

217

218 219

220

221

222

223 224

225

226 227

228

229 230

231

232

233

234

235

236 237

238

239

240

of such application when the required information or documents are not received.

- (3) EARLY RETIREMENT BENEFIT.—Upon retirement on his or her early retirement date, the member shall receive an immediate monthly benefit that shall begin to accrue on the first day of the month of the retirement date and be payable on the last day of that month and each month thereafter during his or her lifetime. Such benefit shall be calculated as follows:
 - (a) For a member initially enrolled:
- Before July 1, 2011, the amount of each monthly payment shall be computed in the same manner as for a normal retirement benefit, in accordance with subsection (1), but shall be based on the member's average monthly compensation and creditable service as of the member's early retirement date. The benefit so computed shall be reduced by five-twelfths of 1 percent for each complete month by which the early retirement date precedes the normal retirement date of age 62 for a member of the Regular Class, Senior Management Service Class, or the Elected Officers' Class, and age 55 for a member of the Special Risk Class, or age 52 if a Special Risk member has completed 25 years of creditable service in accordance with s. 121.021(29)(b)1.c.
- On or after July 1, 2011, the amount of each monthly payment shall be computed in the same manner as for a normal retirement benefit, in accordance with subsection (1), but shall be based on the member's average monthly compensation and creditable service as of the member's early retirement date. The benefit so computed shall be reduced by five-twelfths of 1 percent for each complete month by which the early retirement 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

241

242

243

244

245

246

247

248

249

250

251

252

253

254

255

256

257

258

259

260

261

262

263

264

265 266

267

268

date precedes the normal retirement date of age 65 for a member of the Regular Class, Senior Management Service Class, or the Elected Officers' Class, and age $\underline{55}$ 60 for a member of the Special Risk Class, or age $\underline{50}$ 57 if a Special Risk member has completed $\underline{25}$ 30 years of creditable service in accordance with s. 121.021(29)(b)2.b. $\underline{5.}$ 121.021(29)(b)2.c.

- (4) DISABILITY RETIREMENT BENEFIT.-
- (a) Disability retirement; entitlement and effective date.—
- A member who becomes totally and permanently disabled, as defined in paragraph (b), after completing 5 years of creditable service, or a member who becomes totally and permanently disabled in the line of duty regardless of service, is entitled to a monthly disability benefit; except that any member with less than 5 years of creditable service on July 1, 1980, or any person who becomes a member of the Florida Retirement System on or after such date must have completed 10 years of creditable service before becoming totally and permanently disabled in order to receive disability retirement benefits for any disability which occurs other than in the line of duty. However, if a member employed on July 1, 1980, who has less than 5 years of creditable service as of that date becomes totally and permanently disabled after completing 5 years of creditable service and is found not to have attained fully insured status for benefits under the federal Social Security Act, such member is entitled to a monthly disability benefit.
- b. Effective July 1, 2001, for a member initially enrolled before July 1, 2012, a member of the pension plan who becomes 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

totally and permanently disabled, as defined in paragraph (b), after completing 8 years of creditable service, or a member who becomes totally and permanently disabled in the line of duty regardless of service, is entitled to a monthly disability benefit.

- c. For a member of the pension plan who is initially enrolled on or after July 1, 2012, and becomes totally and permanently disabled, as defined in paragraph (b), after completing the years of service for vesting in s. 121.021, or a member who becomes totally and permanently disabled in the line of duty regardless of service, is entitled to a monthly disability benefit.
- 2. If the division has received from the employer the required documentation of the member's termination of employment, the effective retirement date for a member who applies and is approved for disability retirement shall be established by rule of the division.
- 3. For a member who is receiving Workers' Compensation payments, the effective disability retirement date may not precede the date the member reaches Maximum Medical Improvement (MMI), unless the member terminates employment before reaching MMI.
- Section 4. Paragraphs (a), (b), and (g) of subsection (5) of section 121.35, Florida Statutes, are amended to read:
- - (5) BENEFITS.-

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 11 of 40

(a) Benefits are payable under the optional retirement
program only to vested members participating in the program, or
their beneficiaries as designated by the member in the contract
with a provider company, and such benefits shall be paid only by
the designated company in accordance with s. 403(b) of the
Internal Revenue Code and the terms of the annuity contract or
<u>investment</u> contracts applicable to the member. A "benefit" under
the optional retirement program is a distribution requested by
the member or surviving beneficiary funded in part or in whole
by employer or required employee contributions, plus earnings
and includes rolling a distribution over to another qualified
plan. Benefits accrue in individual accounts that are member-
directed, portable, and funded by employer and employee
contributions and the earnings thereon. The member must be
terminated for 3 calendar months from all employment
relationships with all Florida Retirement System employers to
begin receiving the benefit. The department may authorize a
distribution of up to 10 percent of the member's account after
being terminated from employment with participating employers
for 1 calendar month if the member has reached the normal
retirement date as defined in s. 121.021. The department may
adopt rules to implement this provision. Benefits funded by
employer and required employee contributions are payable in
accordance with the following terms and conditions:

1. Benefits shall be paid only to a participating member, to his or her beneficiaries, or to his or her estate, as designated by the member.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 12 of 40

- 2. Benefits shall be paid by the provider company or companies in accordance with the law, the provisions of the contract, and any applicable department rule or policy.
- 3. In the event of a member's death, moneys accumulated by, or on behalf of, the member, less withholding taxes remitted to the Internal Revenue Service, if any, shall be distributed to the member's designated beneficiary or beneficiaries, or to the member's estate, as if the member retired on the date of death, as provided in paragraph (d). No other death benefits are available to survivors of members under the optional retirement program except for such benefits, or coverage for such benefits, as are separately afforded by the employer, at the employer's discretion.
- (b) Benefits, including employee contributions, are not payable for employee hardships, unforeseeable emergencies, loans, medical expenses, educational expenses, purchase of a principal residence, payments necessary to prevent eviction or foreclosure on an employee's principal residence, or any other reason except a requested distribution for retirement, a mandatory de minimis distribution authorized by the administrator, or a required minimum distribution provided pursuant to the Internal Revenue Code before termination from all employment relationships with participating employers for 3 calendar months.
- (g) Benefits funded by the participating member's voluntary personal contributions may be paid out <u>after</u> termination from employment with all participating employers for 3 calendar months at any time and in any form within the limits 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 13 of 40

357.

provided in the contract between the member and the provider company. The member shall notify the provider company regarding the date and provisions under which he or she wants to receive the employee-funded portion of the plan.

Section 5. Paragraph (i) of subsection (2), paragraph (b) of subsection (3), and subsection (4) of section 121.4501, Florida Statutes, are amended to read:

- 121.4501 Florida Retirement System Investment Plan.-
- (2) DEFINITIONS.—As used in this part, the term:
- (i) "Member" or "employee" means an eligible employee who enrolls in or is defaulted into the investment plan as provided in subsection (4), a terminated Deferred Retirement Option Program member as described in subsection (21), or a beneficiary or alternate payee of a member or employee.
 - (3) RETIREMENT SERVICE CREDIT; TRANSFER OF BENEFITS.-
- (b) Notwithstanding paragraph (a), an eligible employee who elects to participate in or is defaulted into the investment plan and establishes one or more individual member accounts may elect to transfer to the investment plan a sum representing the present value of the employee's accumulated benefit obligation under the pension plan, except as provided in paragraph (4)(d). Upon transfer, all service credit earned under the pension plan is nullified for purposes of entitlement to a future benefit under the pension plan. A member may not transfer the accumulated benefit obligation balance from the pension plan after the time period for enrolling in the investment plan has expired.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 14 of 40

378

379

380

381

382

383

384

385

386

387

388

389

390

391

392

393

394

395

396

397398

399

400

401

402

403

404

405

- For purposes of this subsection, the present value of 1. the member's accumulated benefit obligation is based upon the member's estimated creditable service and estimated average final compensation under the pension plan, subject to recomputation under subparagraph 2. For state employees, initial estimates shall be based upon creditable service and average final compensation as of midnight on June 30, 2002; for district school board employees, initial estimates shall be based upon creditable service and average final compensation as of midnight on September 30, 2002; and for local government employees, initial estimates shall be based upon creditable service and average final compensation as of midnight on December 31, 2002. The dates specified are the "estimate date" for these employees. The actuarial present value of the employee's accumulated benefit obligation shall be based on the following:
- a. The discount rate and other relevant actuarial assumptions used to value the Florida Retirement System Trust Fund at the time the amount to be transferred is determined, consistent with the factors provided in sub-subparagraphs b. and c.
- b. A benefit commencement age, based on the member's estimated creditable service as of the estimate date.
- c. Except as provided under sub-subparagraph d., for a
 member initially enrolled:
- (I) Before July 1, 2011, the benefit commencement age is the younger of the following, but may not be younger than the member's age as of the estimate date:
- (A) Age 62; or 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 15 of 40

- (B) The age the member would attain if the member completed 30 years of service with an employer, assuming the member worked continuously from the estimate date, and disregarding any vesting requirement that would otherwise apply under the pension plan.
- (II) On or after July 1, 2011, the benefit commencement age is the younger of the following, but may not be younger than the member's age as of the estimate date:
 - (A) Age 65; or
- (B) The age the member would attain if the member completed 33 years of service with an employer, assuming the member worked continuously from the estimate date, and disregarding any vesting requirement that would otherwise apply under the pension plan.
- d. For members of the Special Risk Class and for members of the Special Risk Administrative Support Class entitled to retain the special risk normal retirement date:
- (I) Initially enrolled before July 1, 2011, the benefit commencement age is the younger of the following, but may not be younger than the member's age as of the estimate date:
 - (A) Age 55; or
- (B) The age the member would attain if the member completed 25 years of service with an employer, assuming the member worked continuously from the estimate date, and disregarding any vesting requirement that would otherwise apply under the pension plan.
- (II) Initially enrolled on or after July 1, 2011, the benefit commencement age is the younger of the following, but 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 16 of 40

may not be younger than the member's age as of the estimate date:

- (A) Age 55 60; or
- (B) The Age 50 the member would attain if the member completed 25 30 years of service with an employer, assuming the member worked continuously from the estimate date, and disregarding any vesting requirement that would otherwise apply under the pension plan.
- e. The calculation must disregard vesting requirements and early retirement reduction factors that would otherwise apply under the pension plan.
- 2. For each member who elects to transfer moneys from the pension plan to his or her account in the investment plan, the division shall recompute the amount transferred under subparagraph 1. within 60 days after the actual transfer of funds based upon the member's actual creditable service and actual final average compensation as of the initial date of participation in the investment plan. If the recomputed amount differs from the amount transferred by \$10 or more, the division shall:
- a. Transfer, or cause to be transferred, from the Florida Retirement System Trust Fund to the member's account the excess, if any, of the recomputed amount over the previously transferred amount together with interest from the initial date of transfer to the date of transfer under this subparagraph, based upon the effective annual interest equal to the assumed return on the actuarial investment which was used in the most recent actuarial valuation of the system, compounded annually.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 17 of 40

- b. Transfer, or cause to be transferred, from the member's account to the Florida Retirement System Trust Fund the excess, if any, of the previously transferred amount over the recomputed amount, together with interest from the initial date of transfer to the date of transfer under this subparagraph, based upon 6 percent effective annual interest, compounded annually, pro rata based on the member's allocation plan.
- 3. If contribution adjustments are made as a result of employer errors or corrections, including plan corrections, following recomputation of the amount transferred under subparagraph 1., the member is entitled to the additional contributions or is responsible for returning any excess contributions resulting from the correction. However, any return of such erroneous excess pretax contribution by the plan must be made within the period allowed by the Internal Revenue Service. The present value of the member's accumulated benefit obligation shall not be recalculated.
- 4. As directed by the member, the state board shall transfer or cause to be transferred the appropriate amounts to the designated accounts within 30 days after the effective date of the member's participation in the investment plan unless the major financial markets for securities available for a transfer are seriously disrupted by an unforeseen event that causes the suspension of trading on any national securities exchange in the country where the securities were issued. In that event, the 30-day period may be extended by a resolution of the state board. Transfers are not commissionable or subject to other fees and may be in the form of securities or cash, as determined by the 210657 Strike-all.Workman.docx

Published On: 1/30/2012 6:56:25 PM

490

491

492

493 494

495

496

497

498

499

500

501

502

503

504

505

506

507

508

509

510

511512

513 514

515

516

517

state board. Such securities are valued as of the date of receipt in the member's account.

- 5. If the state board or the division receives notification from the United States Internal Revenue Service that this paragraph or any portion of this paragraph will cause the retirement system, or a portion thereof, to be disqualified for tax purposes under the Internal Revenue Code, the portion that will cause the disqualification does not apply. Upon such notice, the state board and the division shall notify the presiding officers of the Legislature.
 - (4) PARTICIPATION; ENROLLMENT.-
- (a)1. With respect to an eligible employee who is employed in a regularly established position on June 1, 2002, by a state employer:
- Any such employee may elect to participate in the a. investment plan in lieu of retaining his or her membership in the pension plan. The election must be made in writing or by electronic means and must be filed with the third-party administrator by August 31, 2002, or, in the case of an active employee who is on a leave of absence on April 1, 2002, by the last business day of the 5th month following the month the leave of absence concludes. This election is irrevocable, except as provided in paragraph (g). Upon making such election, the employee shall be enrolled as a member of the investment plan, the employee's membership in the Florida Retirement System is governed by the provisions of this part, and the employee's membership in the pension plan terminates. The employee's enrollment in the investment plan is effective the first day of 210657 - Strike-all.Workman.docx

Published On: 1/30/2012 6:56:25 PM

the month for which a full month's employer contribution is made to the investment plan.

- b. Any such employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 2. With respect to employees who become eligible to participate in the investment plan by reason of employment in a regularly established position with a state employer commencing after April 1, 2002, through June 30, 2012:
- a. Any such employee shall, by default, be enrolled in the pension plan at the commencement of employment, and may, by the last business day of the 5th month following the employee's month of hire, elect to participate in the investment plan. The employee's election must be made in writing or by electronic means and must be filed with the third-party administrator. The election to participate in the investment plan is irrevocable, except as provided in paragraph $(h) \cdot (g)$.
- b. If the employee files such election within the prescribed time period, enrollment in the investment plan is effective on the first day of employment. The retirement contributions paid through the month of the employee plan change shall be transferred to the investment program, and, effective the first day of the next month, the employer and employee must pay the applicable contributions based on the employee membership class in the program.

545

546

547

548

549

550

551

552

553

554

555

556

557

558

559

560

561

562

563

564

565

566

567

568

569

570

571

572

- c. Any such An employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 3. With respect to employees who become eligible to participate in the investment plan pursuant to s. 121.051(2)(c)3. or s. 121.35(3)(i), the employee may elect to participate in the investment plan in lieu of retaining his or her membership in the State Community College System Optional Retirement Program or the State University System Optional Retirement Program. The election must be made in writing or by electronic means and must be filed with the third-party administrator. This election is irrevocable, except as provided in paragraph (h) (g). Upon making such election, the employee shall be enrolled as a member in the investment plan, the employee's membership in the Florida Retirement System is governed by the provisions of this part, and the employee's participation in the State Community College System Optional Retirement Program or the State University System Optional Retirement Program terminates. The employee's enrollment in the investment plan is effective on the first day of the month for which a full month's employer and employee contribution is made to the investment plan.
- 4. For purposes of this paragraph, "state employer" means any agency, board, branch, commission, community college, department, institution, institution of higher education, or water management district of the state, which participates in 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 21 of 40

573

574

575 576

577

578

579

580

581

582

583

584

585

586

587

588

589

590

591

592

593

594

595

596

597

598

599

600

the Florida Retirement System for the benefit of certain employees.

- (b)1. With respect to an eligible employee who is employed in a regularly established position on September 1, 2002, by a district school board employer:
- Any such employee may elect to participate in the investment plan in lieu of retaining his or her membership in the pension plan. The election must be made in writing or by electronic means and must be filed with the third-party administrator by November 30, or, in the case of an active employee who is on a leave of absence on July 1, 2002, by the last business day of the 5th month following the month the leave of absence concludes. This election is irrevocable, except as provided in paragraph (g). Upon making such election, the employee shall be enrolled as a member of the investment plan, the employee's membership in the Florida Retirement System is governed by the provisions of this part, and the employee's membership in the pension plan terminates. The employee's enrollment in the investment plan is effective the first day of the month for which a full month's employer contribution is made to the investment program.
- b. Any such employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 2. With respect to employees who become eligible to participate in the investment plan by reason of employment in a 210657 Strike-all.Workman.docx
 Published On: 1/30/2012 6:56:25 PM

Page 22 of 40

regularly established position with a district school board employer commencing after July 1, 2002, through June 30, 2012:

- a. Any such employee shall, by default, be enrolled in the pension plan at the commencement of employment, and may, by the last business day of the 5th month following the employee's month of hire, elect to participate in the investment plan. The employee's election must be made in writing or by electronic means and must be filed with the third-party administrator. The election to participate in the investment plan is irrevocable, except as provided in paragraph $(h) \cdot (g)$.
- b. If the employee files such election within the prescribed time period, enrollment in the investment plan is effective on the first day of employment. The employer retirement contributions paid through the month of the employee plan change shall be transferred to the investment plan, and, effective the first day of the next month, the employer shall pay the applicable contributions based on the employee membership class in the investment plan.
- c. Any such employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 3. For purposes of this paragraph, "district school board employer" means any district school board that participates in the Florida Retirement System for the benefit of certain employees, or a charter school or charter technical career

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 23 of 40

628

629

630

631

632

633

634

635

636

637

638

639

640

641

642

643

644

645

646

647

648

649

650

651

652

653

654

655

center that participates in the Florida Retirement System as provided in s. 121.051(2)(d).

- (c)1. With respect to an eligible employee who is employed in a regularly established position on December 1, 2002, by a local employer:
- Any such employee may elect to participate in the investment plan in lieu of retaining his or her membership in the pension plan. The election must be made in writing or by electronic means and must be filed with the third-party administrator by February 28, 2003, or, in the case of an active employee who is on a leave of absence on October 1, 2002, by the last business day of the 5th month following the month the leave of absence concludes. This election is irrevocable, except as provided in paragraph (g). Upon making such election, the employee shall be enrolled as a participant of the investment plan, the employee's membership in the Florida Retirement System is governed by the provisions of this part, and the employee's membership in the pension plan terminates. The employee's enrollment in the investment plan is effective the first day of the month for which a full month's employer contribution is made to the investment plan.
- b. Any such employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 2. With respect to employees who become eligible to participate in the investment plan by reason of employment in a 210657 Strike-all.Workman.docx
 Published On: 1/30/2012 6:56:25 PM

Page 24 of 40

regularly established position with a local employer commencing after October 1, 2002, through June 30, 2012:

- a. Any such employee shall, by default, be enrolled in the pension plan at the commencement of employment, and may, by the last business day of the 5th month following the employee's month of hire, elect to participate in the investment plan. The employee's election must be made in writing or by electronic means and must be filed with the third-party administrator. The election to participate in the investment plan is irrevocable, except as provided in paragraph (h) (g).
- b. If the employee files such election within the prescribed time period, enrollment in the investment plan is effective on the first day of employment. The employer retirement contributions paid through the month of the employee plan change shall be transferred to the investment plan, and, effective the first day of the next month, the employer shall pay the applicable contributions based on the employee membership class in the investment plan.
- c. Any such employee who fails to elect to participate in the investment plan within the prescribed time period is deemed to have elected to retain membership in the pension plan, and the employee's option to elect to participate in the investment plan is forfeited.
- 3. For purposes of this paragraph, "local employer" means any employer not included in paragraph (a) or paragraph (b).
- (d)1. With respect to employees who become eligible to participate in the investment plan by reason of employment in a regularly established position commencing on or after July 1,

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 25 of 40

2012, any such employee shall be enrolled in the pension plan at the commencement of employment, and may, by the last business day of the 5th month following the employee's month of hire, elect to participate in the pension plan or the investment plan. Eligible employees may only make a plan election if they are earning service credit in an employer-employee relationship consistent with s. 121.021(17)(b), excluding leaves of absence without pay.

- 2. The employee's election must be made in writing or by electronic means and must be filed with the third-party administrator. The election to participate in the pension plan or investment plan is irrevocable, except as provided in paragraph (h).
- 3. If the employee fails to make an election to either the pension plan or investment plan during the five months following the month of hire the employee is deemed to have elected the investment plan, and will be defaulted to the investment plan retroactively to the employee's date of employment. The employee's option to participate in the pension plan is forfeited, except as provided in paragraph (h).
- 4. The amount of the employee and employer contributions paid prior to the default to the investment plan shall be transferred to the investment plan along with any accumulated benefit obligation from previous pension plan service and placed in a default fund as designated by the State Board of Administration. The employee may move the contributions once an account is activated in the investment plan.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 26 of 40

711

712

713

714

715

716

717

718

719

720

721

722

723

724

725

726

727

728

729

730

731

732

733

734

735

736

737

738

5. Effective the first day of the month after an eligible employee makes a plan election to the pension plan or investment plan, or after the month of default to the investment plan, the employee and employer shall pay the applicable contributions based on the employee membership class in the pension plan or investment plan.

(e) (d) Contributions available for self-direction by a member who has not selected one or more specific investment products shall be allocated as prescribed by the state board. The third-party administrator shall notify the member at least quarterly that the member should take an affirmative action to make an asset allocation among the investment products.

(f) (e) On or after July 1, 2011, a member of the pension plan who obtains a refund of employee contributions retains his or her prior plan choice upon return to employment in a regularly established position with a participating employer.

(g) (f) A member of the investment plan who takes a distribution of any contributions from his or her investment plan account is considered a retiree. A retiree who is initially reemployed on or after July 1, 2010, is not eligible for renewed membership.

(h) (g) After the period during which an eligible employee had the choice to elect the pension plan or the investment plan, or the month following the receipt of the eligible employee's plan election, if sooner, the employee shall have one opportunity, at the employee's discretion, to choose to move from the pension plan to the investment plan or from the investment plan to the pension plan. Eligible employees may 210657 - Strike-all.Workman.docx

739

740

741 742

743

744

745

746

747

748

749

750

751

752

753

754

755

756

757

758759

760

761

762

763

764

765

766

elect to move between plans only if they are earning service credit in an employer-employee relationship consistent with s. 121.021(17)(b), excluding leaves of absence without pay. Effective July 1, 2005, such elections are effective on the first day of the month following the receipt of the election by the third-party administrator and are not subject to the requirements regarding an employer-employee relationship or receipt of contributions for the eligible employee in the effective month, except when the election is received by the third-party administrator. This paragraph is contingent upon approval by the Internal Revenue Service.

- 1. If the employee chooses to move to the investment plan, the provisions of subsection (3) govern the transfer.
- If the employee chooses to move to the pension plan, the employee must transfer from his or her investment plan account, and from other employee moneys as necessary, a sum representing the present value of that employee's accumulated benefit obligation immediately following the time of such movement, determined assuming that attained service equals the sum of service in the pension plan and service in the investment plan. Benefit commencement occurs on the first date the employee is eligible for unreduced benefits, using the discount rate and other relevant actuarial assumptions that were used to value the pension plan liabilities in the most recent actuarial valuation. For any employee who, at the time of the second election, already maintains an accrued benefit amount in the pension plan, the then-present value of the accrued benefit is deemed part of the required transfer amount. The division must ensure that the 210657 - Strike-all.Workman.docx

767

768

769

770

771

772

773

774

775

776

777 778

779

780

781

782

783

784

785

786

787

788

789

790

791

792

793

794

transfer sum is prepared using a formula and methodology certified by an enrolled actuary. A refund of any employee contributions or additional member payments made which exceed the employee contributions that would have accrued had the member remained in the pension plan and not transferred to the investment plan is not permitted.

- Notwithstanding subparagraph 2., an employee who chooses to move to the pension plan and who became eligible to participate in the investment plan by reason of employment in a regularly established position with a state employer after June 1, 2002; a district school board employer after September 1, 2002; or a local employer after December 1, 2002, must transfer from his or her investment plan account, and from other employee moneys as necessary, a sum representing the employee's actuarial accrued liability. A refund of any employee contributions or additional participant payments made which exceed the employee contributions that would have accrued had the member remained in the pension plan and not transferred to the investment plan is not permitted.
- An employee's ability to transfer from the pension plan to the investment plan pursuant to paragraphs $(a)-(g)\frac{(a)-(d)}{(a)}$, and the ability of a current employee to have an option to later transfer back into the pension plan under subparagraph 2., shall be deemed a significant system amendment. Pursuant to s. 121.031(4), any resulting unfunded liability arising from actual original transfers from the pension plan to the investment plan must be amortized within 30 plan years as a separate unfunded actuarial base independent of the reserve stabilization 210657 - Strike-all.Workman.docx

mechanism defined in s. 121.031(3)(f). For the first 25 years, a direct amortization payment may not be calculated for this base. During this 25-year period, the separate base shall be used to offset the impact of employees exercising their second program election under this paragraph. The actuarial funded status of the pension plan will not be affected by such second program elections in any significant manner, after due recognition of the separate unfunded actuarial base. Following the initial 25-year period, any remaining balance of the original separate base shall be amortized over the remaining 5 years of the required 30-year amortization period.

5. If the employee chooses to transfer from the investment plan to the pension plan and retains an excess account balance in the investment plan after satisfying the buy-in requirements under this paragraph, the excess may not be distributed until the member retires from the pension plan. The excess account balance may be rolled over to the pension plan and used to purchase service credit or upgrade creditable service in the pension plan.

Section 6. Paragraph (b) of subsection (2) of section 121.591, Florida Statutes, is amended to read:

121.591 Payment of benefits.—Benefits may not be paid under the Florida Retirement System Investment Plan unless the member has terminated employment as provided in s.

121.021(39)(a) or is deceased and a proper application has been filed as prescribed by the state board or the department. Before termination of employment, benefits, including employee

contributions, are not payable under the investment plan for 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

COMMITTEE/SUBCOMMITTEE AMENDMENT Bill No. HB 525 (2012)

Amendment No.

823

824

825

826

827

828

829

830

831

832

833

834835

836

837

838

839

840 841

842

843

844

845

846

847

848

849

850

employee hardships, unforeseeable emergencies, loans, medical expenses, educational expenses, purchase of a principal residence, payments necessary to prevent eviction or foreclosure on an employee's principal residence, or any other reason prior to termination from all employment relationships with participating employers. The state board or department, as appropriate, may cancel an application for retirement benefits if the member or beneficiary fails to timely provide the information and documents required by this chapter and the rules of the state board and department. In accordance with their respective responsibilities, the state board and the department shall adopt rules establishing procedures for application for retirement benefits and for the cancellation of such application if the required information or documents are not received. The state board and the department, as appropriate, are authorized to cash out a de minimis account of a member who has been terminated from Florida Retirement System covered employment for a minimum of 6 calendar months. A de minimis account is an account containing employer and employee contributions and accumulated earnings of not more than \$5,000 made under the provisions of this chapter. Such cash-out must be a complete lump-sum liquidation of the account balance, subject to the provisions of the Internal Revenue Code, or a lump-sum direct rollover distribution paid directly to the custodian of an eligible retirement plan, as defined by the Internal Revenue Code, on behalf of the member. Any nonvested accumulations and associated service credit, including amounts transferred to the suspense account of the Florida Retirement System Investment 210657 - Strike-all.Workman.docx

851

852

853

854

855

856

857

858

859

860

861

862863

864

865

866

867

868

869

870

871

872

873

874

875

876l

877

Plan Trust Fund authorized under s. 121.4501(6), shall be forfeited upon payment of any vested benefit to a member or beneficiary, except for de minimis distributions or minimum required distributions as provided under this section. If any financial instrument issued for the payment of retirement benefits under this section is not presented for payment within 180 days after the last day of the month in which it was originally issued, the third-party administrator or other duly authorized agent of the state board shall cancel the instrument and credit the amount of the instrument to the suspense account of the Florida Retirement System Investment Plan Trust Fund authorized under s. 121.4501(6). Any amounts transferred to the suspense account are payable upon a proper application, not to include earnings thereon, as provided in this section, within 10 years after the last day of the month in which the instrument was originally issued, after which time such amounts and any earnings attributable to employer contributions shall be forfeited. Any forfeited amounts are assets of the trust fund and are not subject to chapter 717.

- (2) DISABILITY RETIREMENT BENEFITS.—Benefits provided under this subsection are payable in lieu of the benefits that would otherwise be payable under the provisions of subsection (1). Such benefits must be funded from employer contributions made under s. 121.571, transferred employee contributions and funds accumulated pursuant to paragraph (a), and interest and earnings thereon.
 - (b) Disability retirement; entitlement.-

- 1.a. For a member of the investment plan who is initially enrolled before July 1, 2012, and becomes totally and permanently disabled, as defined in paragraph (d), after completing 8 years of creditable service, or a member who becomes totally and permanently disabled in the line of duty regardless of length of service, is entitled to a monthly disability benefit.
- b. For a member of the investment plan who is initially enrolled on or after July 1, 2012, and becomes totally and permanently disabled, as defined in paragraph (d), after completing the years of service required for vesting in s.

 121.021, or a member who becomes totally and permanently disabled in the line of duty regardless of length of service, is entitled to a monthly disability benefit.
- 2. In order for service to apply toward the 8 years of creditable service required for regular disability benefits, or toward the creditable service used in calculating a service-based benefit as provided under paragraph (g), the service must be creditable service as described below:
- a. The member's period of service under the investment plan shall be considered creditable service, except as provided in subparagraph d.
- b. If the member has elected to retain credit for service under the pension plan as provided under s. 121.4501(3), all such service shall be considered creditable service.
- c. If the member elects to transfer to his or her member accounts a sum representing the present value of his or her retirement credit under the pension plan as provided under s. 210657 Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 33 of 40

121.4501(3), the period of service under the pension plan represented in the present value amounts transferred shall be considered creditable service, except as provided in subparagraph d.

d. If a member has terminated employment and has taken distribution of his or her funds as provided in subsection (1), all creditable service represented by such distributed funds is forfeited for purposes of this subsection.

Section 7. Paragraph (b) of subsection (5) and subsection (7) of section 1012.875, Florida Statutes, are amended to read:

Retirement Program.—Each Florida College System institution may implement an optional retirement program, if such program is established therefor pursuant to s. 1001.64(20), under which annuity or other contracts providing retirement and death benefits may be purchased by, and on behalf of, eligible employees who participate in the program, in accordance with s. 403(b) of the Internal Revenue Code. Except as otherwise provided herein, this retirement program, which shall be known as the State Community College System Optional Retirement Program, may be implemented and administered only by an individual Florida College System institution or by a consortium of Florida College System institutions.

(5)

(b) Benefits are payable under the optional retirement program to program participants or their beneficiaries and paid only by the designated company in accordance with the terms of the contracts applicable to the program participant. Benefits 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

2012 0.30.23 FM

shall accrue in individual accounts that are participant-directed, portable, and funded by employer and employee contributions and the earnings thereon. Benefit payments may not be made until the member has been terminated for 3 calendar months, except, the college may authorize a distribution of up to 10 percent of the member's account after being terminated from employment with Florida Retirement System participating employers for 1 calendar month if the member has reached the normal retirement date as defined in s. 121.021. The college may adopt rules to implement this provision. Benefits funded by employer and employee contributions are payable in accordance with the following terms and conditions:

- 1. Benefits shall be payable only to a participant, to his or her beneficiaries, or to his or her estate, as designated by the participant.
- 2. Benefits shall be paid by the provider company or companies in accordance with the law, the provisions of the contract, and any applicable employer rule or policy.
- 3. In the event of a participant's death, moneys accumulated by, or on behalf of, the participant, less withholding taxes remitted to the Internal Revenue Service, if any, shall be distributed to the participant's designated beneficiary or beneficiaries, or to the participant's estate, as if the participant retired on the date of death as provided in paragraph (d). No other death benefits are available for survivors of participants under the optional retirement program except for such benefits, or coverage for such benefits, as are

separately afforded by the employer at the employer's discretion.

- (7) Benefits, including employee contributions, are not payable for employee hardships, unforeseeable emergencies, loans, medical expenses, educational expenses, purchase of a principal residence, payments necessary to prevent eviction or foreclosure on an employee's principal residence, or any other reason except a requested distribution for retirement, a mandatory de minimis distribution authorized by the administrator, or a required minimum distribution provided pursuant to the Internal Revenue Code before termination from all employment relationships with participating employers for 3 calendar months.
- Section 8. (1) Effective July 1, 2012, in order to fund the benefit changes provided in this act, the required contribution rates of the Florida Retirement System Pension Plan shall be adjusted as follows:
- (a) Regular class shall be decreased by 0.05 percentage points.
- (b) Special Risk Class shall be increased by 1.19 percentage points.
- (c) Special Risk Administrative Support Class shall be increased by 0.65 percentage points.
- (d) Elected Officers' Class for Legislators, Governor, Lt.

 Governor, Cabinet Officers, State Attorneys, and Public

 Defenders shall be decreased by 0.58 percentage points.
- 987 (e) Elected Officers' Class for Justices and Judges shall 988 be decreased by 0.17 percentage points.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 36 of 40

	Amer	dmen	t	No.
--	------	------	---	-----

989

991

992

993

994

995

996

997

998 999

1000

1001

1002

1003

1004

1005

1006

1007

1008

1009 1010

1011

1012

1013 1014

1015

1016

- (f) Elected Officers' Class for County Elected Officers shall be decreased by 0.59 percentage points.
- (g) Senior Management Service Class shall be decreased by 0.11 percentage points.
- (h) Deferred Retirement Option Program shall be increased by 0.33 percentage points.
- (2) Effective July 1, 2012, in order to fund the benefit changes provided in this act, the required employer contribution rates for the unfunded actuarial liability of the Florida

 Retirement System Pension Plan shall be adjusted as follows:
- (a) Regular Class shall be decreased by 0.02 percentage points.
- (b) Special Risk Class shall be decreased by 0.51 percentage points.
- (c) Special Risk Administrative Support Class shall be decreased by 0.27 percentage points.
- (d) Elected Officers' Class for Legislators, Governor, Lt. Governor, Cabinet Officers, State Attorneys, and Public Defenders shall be decreased by 0.06 percentage points.
- (e) Elected Officers' Class for Justices and Judges shall be decreased by 0.06 percentage points.
- (f) Elected Officers' Class for County Elected Officers shall be increased by 0.32 percentage points.
- (g) Senior Management Service Class shall be decreased by 0.01 percentage points.
- (3) The adjustments provided in subsections (1) and (2) shall be in addition to all other changes to such contribution rates which may be enacted into law to take effect on that date.

210657 - Strike-all.Workman.docx

COMMITTEE/SUBCOMMITTEE AMENDMENT

	BILL NO. HB 323 (2012)
	Amendment No.
1017	The Division of Statutory Revision is directed to adjust
1018	accordingly the contribution rates set forth in s. 121.71,
1019	Florida Statutes.
1020	Section 9. The Legislature finds that a proper and
1021	legitimate state purpose is served when employees and retirees
1022	of the state and its political subdivisions, and the dependents,
1023	survivors, and beneficiaries of such employees and retirees are
1024	extended the basic protections afforded by governmental
1025	retirement systems that provide fair and adequate benefits and
1026	that are managed, administered, and funded in an actuarially
1027	sound manner as required by s. 14, Art. X of the State
1028	Constitution and part VII of chapter 112, Florida Statutes.
1029	Therefore, the Legislature determines and declares that this act
1030	fulfills an important state interest.
1031	Section 10. This act shall take effect July 1, 2012.
1032	
1033	
1034	
1035	
1036	TITLE AMENDMENT
1037	Remove the entire title and insert:
1038	A bill to be entitled
1039	An act relating to state retirement; amending s. 121.021,
1040	F.S.; revising definitions of the terms "normal retirement
1041	date" and "vested" or "vesting"; amending s. 121.055, F.S.;
1042	clarifying provisions related to the prohibition of

hardship loans or payments; clarifying that a retiree who

is reemployed in a regularly established position after a

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 38 of 40

1043

1044

1045

1046

1047

1048

1049

1050

1051

1052

1053

1054

1055

1056

1057

1058

1059

1060 1061

1062

1063

1064

1065

1066

1067

1068

1069

1070

1071

1072

certain date may not be enrolled as a renewed member; authorizing certain distributions to a member who is terminated from employment for one calendar month if the member has reached the normal retirement date; providing rulemaking authority to the Department of Management Services; amending s. 121.091, F.S.; revising provisions relating to the early retirement benefit calculation to conform to changes made by the act; revising provisions relating to the disability retirement benefit calculation to conform to changes made by the act; amending s. 121.35, F.S.; providing that a benefit for the purposes of the optional retirement program for the State University System includes a certain distribution; clarifying provisions related to the prohibition of hardship loans or payments; clarifying when voluntary contributions may be paid out; authorizing certain distributions to a member who is terminated from employment for one calendar month if the member has reached the normal retirement date; providing rulemaking authority to the Department of Management Services; amending s. 121.4501, F.S.; requiring new employees to, by default, be enrolled in the investment plan; revising the benefit commencement age to conform to changes made by the act; amending s. 121.591, F.S.; revising provisions relating to the disability retirement benefit calculation to conform to changes made by the act; amending s. 1012.875, F.S.; clarifying provisions related to the prohibition of hardship loans or payments; authorizing certain distributions to a member who is 210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM

Page 39 of 40

COMMITTEE/SUBCOMMITTEE AMENDMENT

Bill No. HB 525 (2012)

Amendment No.

terminated from employment for one calendar month if the
member has reached the normal retirement date; providing
rulemaking authority to the college; providing for
contribution rate adjustments to fund benefit changes
provided in this act; directing the Division of Statutory
Revision to adjust contribution rates set forth in s.
121.71, F.S.; providing a declaration of important state
interest; providing an effective date.

210657 - Strike-all.Workman.docx Published On: 1/30/2012 6:56:25 PM Page 40 of 40

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 605 : Hillsborough County

X Favorable

•	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0			

Appearances:

Peterson, Karen (Lobbyist) - Waive In Support City of Tampa 310 West College Avenue Tallahassee FL 32301

Phone: (850)212-7485

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

CS/HB 897 : Construction Liens and Bonds

	Yea Nay	No Vote	Absentee	Absentee	
				Yea	Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan			X		
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson	X				
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young			X		
Jimmy Patronis (Chair)	X				

Total Nays: 0

Total Yeas: 12

Appearances:

Lien

Watson, Richard (Lobbyist) - Opponent Florida Surety Association C/o Michael Dennis 1051 Winderley Place Ste 105

Maitland FL 32751 Phone: (850)222-0000

Lawson, Deborah (Lobbyist) - Waive In Support

National Assn of Credit Mgt-Improved Construction Practices Committee

4125 Pecan Branch Tallahassee FL 32309 Phone: (850)878-1606

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

CS/HB 971 : Judiciary

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens		X			
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford		X			
Barbara Watson		X	,		
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 10	Total Nays: 3			

Appearances:

Adams, Leticia (Lobbyist) - Waive In Support Florida Chamber of Commerce 136 S. Bronough St. Tallahassee FL 32301 Phone: (850) 521-1279

CS/HB 971-Senior Judge Glitch Bill Lawson, Alan (State Employee) - Waive In Support District Judge, Florida Conference of DCA Judges 300 South Beach Street Daytona Beach FL 32114 Phone: 386-947-1506

Senior Judge Glitch Bill
Shinholser, Olin W. (State Employee) - Waive In Support
FL Conference of Circuit Judges
430 S. Commerce Ave
Sebring FL 33870
Phone: 863-402-6901

Judiciary

Large, William (Lobbyist) - Waive In Support Florida Justice Reform Institute 210 S Monroe St Tallahassee FL 32301-1824 Phone: (850)222-0170

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

CS/HB 971 : Judiciary (continued)

Appearances: (continued)

JNC

Perdue, Tammy (Lobbyist) - Waive In Support Associated Industries of Florida 516 N. Adams St. Tallahassee FL 32301

Phone: 850-224-7173

Print Date: 1/31/2012 4:13 pm

Diaz, Pablo (Lobbyist) - Waive In Support National Federation of Independent Business

Leagis ®

Page 15 of 28

AMENDED

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 1089 : Pub. Rec./Investigators & Inspectors/DBPR

AMENDED

X Favorable With Committee Substitute

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	. X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson	X				
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 14	Total Nays: 0			

Appearances:

Public Records/Investigators & Inspectors for DBPR

Miller, Matilde (Lobbyist) (State Employee) - Waive In Support

Department of Business & Professional Regulation

1940 N Monroe St

Tallahassee FL 32399-2210 Phone: (850)487-4827

COMMITTEE/SUBCOMMITTEE AMENDMENT Bill No. HB 1089 (2012)

Amendment No.

COMMITTEE/SUBCOMMITTE	ili AC	T.T.OV
ADOPTED	(3	(N)
ADOPTED AS AMENDED	_ ()	(/N)
ADOPTED W/O OBJECTION	$\mathbf{J}(0)$	(N)
FAILED TO ADOPT	_ (\)	(N)
WITHDRAWN	(3	(N)
OTHER		_

Committee/Subcommittee hearing bill: Government Operations Subcommittee

Representative Adkins offered the following:

Amendment

1

2

3

6

Remove line 196 and insert:

Section 3. This act shall take effect upon becoming a law.

815285 - Amendment.Adkins.docx Published On: 1/30/2012 3:45:18 PM

Page 1 of 1

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 1105 : Special Observances

AMENDED

X Favorable

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Mariene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: ()		

Appearances:

Everglades
Kunkel, Stephanie (Lobbyist) - Waive In Support
Clean Water Association
1830 Meriadoc Road
Tallahassee FL 32303

Phone: 850-320-4208

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB) AMENDED

CS/HB 1211 : Coral Springs Improvement District, Broward County

X X X X X X X				
X X X X X				
X X X X				
X X X				
X X				
X				
v				
А				
		X		
		Х		
X				
X				
X				
X				
X				
	X X X	X X X X	X X X X X	X X X X X

Appearances:

Lyon, Chris (Lobbyist) - Proponent Coral Springs Improvement District 315 S. Calhoun Street Suite 830

Tallahassee FL 32301 Phone: 850-222-5702

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

HB 1301: City of West Palm Beach, Palm Beach County

AMENDED

X Favorable

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	Х				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0			

Appearances:

WPB Pension
Puckett, Matthew (Lobbyist) - Waive In Support
Florida Police Benevolent Association, Inc
300 E Brevard St
Tallahassee FL 32301

Phone: (850)222-3329

Print Date: 1/31/2012 4:13 pm

Leagis ®

Page 19 of 28

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 1325 : City of West Palm Beach, Palm Beach County

X	Favorable
2×	, a , c, abic

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0			

Appearances:

Wesolek, Thomas (General Public) - Waive In Support
Rank and File members of the collective barganing agreement
2801 Tuxedo Ave
West Palm Beach FL undefined

Phone: 561-797-7227

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

HB 1339 : Envelopes Used to Conceal the Voter's Choices

X	Favorable	With	Committee	Substitute

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	· X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0			

1

2

3

4 5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

COMMITTEE/SUBCOMMITTEE ACTION ADOPTED (Y/N)ADOPTED AS AMENDED (Y/N)ADOPTED W/O OBJECTION (N(Y)FAILED TO ADOPT (Y/N)WITHDRAWN (Y/N)OTHER Committee/Subcommittee hearing bill: Government Operations Subcommittee Representative Chestnut offered the following: Amendment (with title amendment) Remove everything after the enacting clause and insert: Section 1. Subsection (9) is added to section 101.5603, Florida Statutes, to read: 101.5603 Definitions relating to Electronic Voting Systems Act.—As used in this act, the term: (9) "Security-enhanced envelope" means a device with a tinted pattern on the inside, used in lieu of a secrecy envelope for enclosing a marked ballot, which conceals the voter's choices. Section 2. Subsections (1), (2), (3), (4), (5), and (7) of section 101.6103, Florida Statutes, are amended to read: 101.6103 Mail ballot election procedure.-(1) Except as otherwise provided in subsection (7), the supervisor of elections shall mail all official ballots with

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

Page 1 of 15

36³

either a secrecy envelope, and a return mailing envelope, or a security-enhanced envelope, and instructions sufficient to describe the voting process to each elector entitled to vote in the election not sooner than the 20th day before the election and not later than the 10th day before the date of the election. All such ballots shall be mailed by first-class mail. Ballots shall be addressed to each elector at the address appearing in the registration records and placed in an envelope which is prominently marked "Do Not Forward."

- (2) (a) In any county in which secrecy envelopes and mailing envelopes are used, upon receipt of the ballot the elector shall mark the ballot, place it in the secrecy envelope, sign the return mailing envelope supplied with the ballot, and comply with the instructions provided with the ballot.
- (b) In any county in which security-enhanced envelopes are used, upon receipt of the ballot the elector shall mark the ballot, place it in the security-enhanced envelope, sign the security-enhanced envelope, and comply with the instructions provided in the ballot.
- (c) The elector shall mail, deliver, or have delivered the marked ballot so that it reaches the supervisor of elections no later than 7 p.m. on the day of the election. The ballot must be returned in the return mailing envelope or security-enhanced envelope.
- (3) The return mailing envelope or security-enhanced envelope shall contain a statement in substantially the following form:

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM Page 2 of 15

47

48 49

50

51

52

53

54

. 55

56

57

58

59

60

61

62

63 64

65 66

67

68

69

VOTER'S CERTIFICATE

I, ...(Print Name)..., do solemnly swear (or affirm) that I am a qualified voter in this election and that I have not and will not vote more than one ballot in this election.

I understand that failure to sign this certificate and give my residence address will invalidate my ballot.

...(Signature)...

... (Residence Address)...

- (4) If the ballot is destroyed, spoiled, lost, or not received by the elector, the elector may obtain a replacement ballot from the supervisor of elections as provided in this subsection. An elector seeking a replacement ballot shall sign a sworn statement that the ballot was destroyed, spoiled, lost, or not received and present such statement to the supervisor of elections prior to 7 p.m. on the day of the election. The supervisor of elections shall keep a record of each replacement ballot provided under this subsection.
 - (5) A ballot shall be counted only if:
- (a) It is returned in the return mailing envelope or security-enhanced envelope;
- (b) The elector's signature has been verified as provided in this subsection; and
- (c) It is received by the supervisor of elections not later than 7 p.m. on the day of the election.

70 71

> 366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM Page 3 of 15

The supervisor of elections shall verify the signature of each elector on the return mailing envelope or security-enhanced envelope with the signature on the elector's registration records. Such verification may commence at any time prior to the canvass of votes. The supervisor of elections shall safely keep the ballot unopened in his or her office until the county canvassing board canvasses the vote. If the supervisor of elections determines that an elector to whom a replacement ballot has been issued under subsection (4) has voted more than once, the canvassing board shall determine which ballot, if any, is to be counted.

(7) With respect to absent electors overseas entitled to vote in the election, the supervisor of elections shall mail an official ballot with <u>either</u> a secrecy envelope, and a return mailing envelope, or a security-enhanced envelope, and instructions sufficient to describe the voting process to each such elector on a date sufficient to allow such elector time to vote in the election and to have his or her marked ballot reach the supervisor by 7 p.m. on the day of the election.

Section 3. Section 101.6104, Florida Statutes, is amended to read:

101.6104 Challenge of votes.—If any elector present for the canvass of votes believes that any ballot is illegal due to any defect apparent on the voter's certificate, the elector may, at any time before the ballot is removed from the envelope, file with the canvassing board a protest against the canvass of such ballot, specifying the reason he or she believes the ballot to be illegal. No challenge based upon any defect on the voter's 366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

100

101

102

103104

105

106

107

108

109

110

111

112

113

114

115

116

117118

119

120

121

122

123

124

- certificate shall be accepted after the ballot has been removed from the return mailing envelope or security-enhanced envelope.
- Section 4. Subsections (1) and (2) of section 101.64, Florida Statutes, are amended to read:
 - 101.64 Delivery of absentee ballots; envelopes; form.-
 - (1)(a) The supervisor shall have the option to:
- 1. Enclose with each absentee ballot two envelopes: a secrecy envelope, into which the absent elector shall enclose his or her marked ballot; and a mailing envelope, into which the absent elector shall then place the secrecy envelope; or
- 2. Enclose a security-enhanced envelope, into which the absent elector shall then place the ballot.
- (b) Mailing envelopes or security-enhanced envelopes which shall be addressed to the supervisor and shall also bear on the back side a certificate in substantially the following form:

Note: Please Read Instructions Carefully Before Marking Ballot and Completing Voter's Certificate.

VOTER'S CERTIFICATE

I, ..., do solemnly swear or affirm that I am a qualified and registered voter of County, Florida, and that I have not and will not vote more than one ballot in this election. I understand that if I commit or attempt to commit any fraud in connection with voting, vote a fraudulent ballot, or vote more than once in an election, I can be convicted of a felony of the third degree and fined up to \$5,000 and/or imprisoned for up to

127

128

129

130

131

132

133

134

135

136

137

138

139

140

141

142

143

144

145

146

147

148

149

150

5 years. I also understand that failure to sign this certificate will invalidate my ballot.

...(Date)... ...(Voter's Signature)...

- (2) The certificate shall be arranged on the back of the mailing envelope or security-enhanced envelope so that the line for the signature of the absent elector is across the seal of the envelope; however, no statement shall appear on the envelope which indicates that a signature of the voter must cross the seal of the envelope. The absent elector shall execute the certificate on the envelope.
- Section 5. Section 101.65, Florida Statutes, is amended to read:
- 101.65 Instructions to absent electors.—The supervisor shall enclose with each absentee ballot separate printed instructions in substantially the following form:

READ THESE INSTRUCTIONS CAREFULLY BEFORE MARKING BALLOT.

- 1. VERY IMPORTANT. In order to ensure that your absentee ballot will be counted, it should be completed and returned as soon as possible so that it can reach the supervisor of elections of the county in which your precinct is located no later than 7 p.m. on the day of the election.
- 2. Mark your ballot in secret as instructed on the ballot. You must mark your own ballot unless you are unable to do so because of blindness, disability, or inability to read or write.
- 3. Mark only the number of candidates or issue choices for a race as indicated on the ballot. If you are allowed to "Vote

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

Page 6 of 15

for One" candidate and you vote for more than one candidate, your vote in that race will not be counted.

- 4. Place your marked ballot in the enclosed secrecy envelope or security-enhanced envelope, whichever is provided.
- 5. <u>If you received a secrecy envelope</u>, insert the secrecy envelope into the enclosed mailing envelope which is addressed to the supervisor.
- 6. Seal the mailing envelope or security-enhanced envelope and completely fill out the Voter's Certificate on the back of the mailing envelope or security-enhanced envelope.
- 7. VERY IMPORTANT. In order for your absentee ballot to be counted, you must sign your name on the line above (Voter's Signature). An absentee ballot will be considered illegal and not be counted if the signature on the voter's certificate does not match the signature on record. The signature on file at the start of the canvass of the absentee ballots is the signature that will be used to verify your signature on the voter's certificate. If you need to update your signature for this election, send your signature update on a voter registration application to your supervisor of elections so that it is received no later than the start of the canvassing of absentee ballots, which occurs no earlier than the 15th day before election day.
- 8. VERY IMPORTANT. If you are an overseas voter, you must include the date you signed the Voter's Certificate on the line above (Date) or your ballot may not be counted.

177

178

179

180

181

182

183

184

185

186

187

188

189

190

191

192

193

194

195

196

197

198

199

200

201

202

203

204

- 9. Mail, deliver, or have delivered the completed mailing envelope or security-enhanced envelope. Be sure there is sufficient postage if mailed.
- 10. FELONY NOTICE. It is a felony under Florida law to accept any gift, payment, or gratuity in exchange for your vote for a candidate. It is also a felony under Florida law to vote in an election using a false identity or false address, or under any other circumstances making your ballot false or fraudulent.
- Section 6. Paragraphs (c) and (d) of subsection (2) of section 101.68, Florida Statutes, are amended to read:
 - 101.68 Canvassing of absentee ballot.-

(2)

The canvassing board shall, if the supervisor has not already done so, compare the signature of the elector on the voter's certificate with the signature of the elector in the registration books to see that the elector is duly registered in the county and to determine the legality of that absentee ballot. The ballot of an elector who casts an absentee ballot shall be counted even if the elector dies on or before election day, as long as, prior to the death of the voter, the ballot was postmarked by the United States Postal Service, date-stamped with a verifiable tracking number by common carrier, or already in the possession of the supervisor of elections. An absentee ballot shall be considered illegal if it does not include the signature of the elector, as shown by the registration records. However, an absentee ballot shall not be considered illegal if the signature of the elector does not cross the seal of the mailing envelope or security-enhanced envelope. If the

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

canvassing board determines that any ballot is illegal, a member of the board shall, without opening the envelope, mark across the face of the envelope: "rejected as illegal." The envelope and the ballot contained therein shall be preserved in the manner that official ballots voted are preserved.

- 2. If any elector or candidate present believes that an absentee ballot is illegal due to a defect apparent on the voter's certificate, he or she may, at any time before the ballot is removed from the envelope, file with the canvassing board a protest against the canvass of that ballot, specifying the precinct, the ballot, and the reason he or she believes the ballot to be illegal. A challenge based upon a defect in the voter's certificate may not be accepted after the ballot has been removed from the mailing envelope or security-enhanced envelope.
- (d) 1. The canvassing board shall record the ballot upon the proper record, unless the ballot has been previously recorded by the supervisor.
- 2.a. In any county in which secrecy envelopes and mailing envelopes are used, the mailing envelopes shall be opened and the secrecy envelopes shall be mixed so as to make it impossible to determine which secrecy envelope came out of which signed mailing envelope; however, in any county in which an electronic or electromechanical voting system is used, the ballots may be sorted by ballot styles and the mailing envelopes may be opened and the secrecy envelopes mixed separately for each ballot style.

232233234235236237

238

239240

241

242

243

244

245

246

247

248

249

250

251

252

253

254

255

256

257

258

259

b. In any county in which security-enhanced envelopes are
used, the supervisor shall separate the market ballots from the
security-enhanced envelopes so as to make it impossible to
determine which ballot came out of which signed security-
enhanced envelope.

3. The votes on absentee ballots shall be included in the total vote of the county.

Section 7. Subsection (2) of section 101.69, Florida Statutes, is amended to read:

101.69 Voting in person; return of absentee ballot.-The provisions of this code shall not be construed to prohibit any elector from voting in person at the elector's precinct on the day of an election or at an early voting site, notwithstanding that the elector has requested an absentee ballot for that election. An elector who has returned a voted absentee ballot to the supervisor, however, is deemed to have cast his or her ballot and is not entitled to vote another ballot or to have a provisional ballot counted by the county canvassing board. An elector who has received an absentee ballot and has not returned the voted ballot to the supervisor, but desires to vote in person, shall return the ballot, whether voted or not, to the election board in the elector's precinct or to an early voting site. The returned ballot shall be marked "canceled" by the board and placed with other canceled ballots. However, if the elector does not return the ballot and the election official:

(2) Confirms that the supervisor has not received the elector's absentee ballot, the elector shall be allowed to vote in person as provided in this code. The elector's absentee 366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

Page 10 of 15

ballot, if subsequently received, shall not be counted and shall remain in the mailing envelope or security-enhanced envelope, and the envelope shall be marked "Rejected as Illegal."

Section 7. Subsection (2) of section 101.6921, Florida Statutes, is amended to read:

101.6921 Delivery of special absentee ballot to certain first-time voters.—

- (2) (a) In any county in which secrecy envelopes and mailing envelopes are used, the supervisor shall enclose with each absentee ballot three envelopes: a secrecy envelope, into which the absent elector will enclose his or her marked ballot; an envelope containing the Voter's Certificate, into which the absent elector shall place the secrecy envelope; and a mailing envelope, which shall be addressed to the supervisor and into which the absent elector will place the envelope containing the Voter's Certificate and a copy of the required identification.
- (b) In any county in which security-enhanced envelopes are used, the supervisor shall enclose with each absentee ballot two envelopes: a security-enhanced envelope containing the Voter's Certificate, into which the absent elector shall place the marked ballot and a mailing envelope, which shall be addressed to the supervisor and into which the absent elector will place the envelope containing the Voter's Certificate and a copy of the required identification.

Section 8. Subsection (2) of section 101.6923, Florida Statutes, is amended to read:

101.6923 Special absentee ballot instructions for certain first-time voters.—

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM

Page 11 of 15

- (2) A voter covered by this section shall be provided with printed instructions with his or her absentee ballot in substantially the following form:
- 291 READ THESE INSTRUCTIONS CAREFULLY BEFORE MARKING YOUR BALLOT.
 292 FAILURE TO FOLLOW THESE INSTRUCTIONS MAY CAUSE YOUR BALLOT NOT
 293 TO COUNT.
 - 1. In order to ensure that your absentee ballot will be counted, it should be completed and returned as soon as possible so that it can reach the supervisor of elections of the county in which your precinct is located no later than 7 p.m. on the date of the election.
 - 2. Mark your ballot in secret as instructed on the ballot. You must mark your own ballot unless you are unable to do so because of blindness, disability, or inability to read or write.
 - 3. Mark only the number of candidates or issue choices for a race as indicated on the ballot. If you are allowed to "Vote for One" candidate and you vote for more than one, your vote in that race will not be counted.
 - 4. Place your marked ballot in the enclosed secrecy envelope or security-enhanced envelope, whichever is provided, and seal the envelope.
 - 5. <u>If you received a secrecy envelope</u>, insert the secrecy envelope into the enclosed envelope bearing the Voter's Certificate. Seal the envelope and completely fill out the Voter's Certificate on the back of the envelope.

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM Page 12 of 15

- a. You must sign your name on the line above (Voter's Signature).
- b. If you are an overseas voter, you must include the date you signed the Voter's Certificate on the line above (Date) or your ballot may not be counted.
- c. An absentee ballot will be considered illegal and will not be counted if the signature on the Voter's Certificate does not match the signature on record. The signature on file at the start of the canvass of the absentee ballots is the signature that will be used to verify your signature on the Voter's Certificate. If you need to update your signature for this election, send your signature update on a voter registration application to your supervisor of elections so that it is received no later than the start of canvassing of absentee ballots, which occurs no earlier than the 15th day before election day.
- 6. Unless you meet one of the exemptions in Item 7., you must make a copy of one of the following forms of identification:
- a. Identification which must include your name and photograph: United States passport; debit or credit card; military identification; student identification; retirement center identification; neighborhood association identification; or public assistance identification; or
- b. Identification which shows your name and current residence address: current utility bill, bank statement, government check, paycheck, or government document (excluding voter identification card).

366737 - Strike-allAmendmentChestnut.docx Published On: 1/30/2012 5:19:43 PM Page 13 of 15

- 7. The identification requirements of Item 6. do not apply if you meet one of the following requirements:
 - a. You are 65 years of age or older.
 - b. You have a temporary or permanent physical disability.
- c. You are a member of a uniformed service on active duty who, by reason of such active duty, will be absent from the county on election day.
- d. You are a member of the Merchant Marine who, by reason of service in the Merchant Marine, will be absent from the county on election day.
- e. You are the spouse or dependent of a member referred to in paragraph c. or paragraph d. who, by reason of the active duty or service of the member, will be absent from the county on election day.
 - f. You are currently residing outside the United States.
- 8. Place the envelope bearing the Voter's Certificate into the mailing envelope addressed to the supervisor. Insert a copy of your identification in the mailing envelope. DO NOT PUT YOUR IDENTIFICATION INSIDE THE SECRECY ENVELOPE WITH THE BALLOT OR INSIDE THE ENVELOPE WHICH BEARS THE VOTER'S CERTIFICATE OR YOUR BALLOT WILL NOT COUNT.
- 9. Mail, deliver, or have delivered the completed mailing envelope. Be sure there is sufficient postage if mailed.
- 10. FELONY NOTICE. It is a felony under Florida law to accept any gift, payment, or gratuity in exchange for your vote for a candidate. It is also a felony under Florida law to vote in an election using a false identity or false address, or under any other circumstances making your ballot false or fraudulent. 366737 Strike-allAmendmentChestnut.docx

Published On: 1/30/2012 5:19:43 PM

COMMITTEE/SUBCOMMITTEE AMENDMENT

Bill No. HB 1339 (2012)

Amendment No.

Section 9. This act shall take effect July 1, 2012.

370

369

371

372

373

374

375

376

377

378

379

380

381

382 383

384

385

386

387

388 389 TITLE AMENDMENT

Remove lines 4-5 and insert: creating a definition for "security-enhanced envelope"; amending s. 101.6103, F.S.; revising mail ballot election procedures; amending s. 101.6104, F.S.; making conforming changes to procedures for the challenge of votes; amending s. 101.64, F.S.; revising procedures for the delivery of absentee ballots; amending s. 101.65, F.S.; making conforming changes to instructions to absent electors; amending s. 101.68, F.S.; making conforming changes to procedures for canvassing of absentee ballots; amending s. 101.69, F.S.; making conforming changes to procedures for voting in person after returning an absentee ballot; amending s. 101.6921, F.S.; making conforming changes to procedures for delivery of special absentee ballots; amending s. 101.6923, F.S.; making conforming changes to special absentee ballot instructions;

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

Print Date: 1/31/2012 4:13 pm

AMENDED

HB 1461: Voter Identification

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	· X				
Jeff Clemens	X				
Janet Cruz		X			
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg		X			
Cynthia Stafford		X			
Barbara Watson		X			
Dana Young	X				
Jimmy Patronis (Chair)	Х				
	Total Yeas: 9	Total Nays: 4	4		

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB) **HB 1479:** State Poet Laureate

AMENDED

X Favorable

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	Х				
Douglas Broxson	X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan			Х		
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Mariene O'Toole			X		
Kenneth Roberson	X				
Irving Slosberg			X		
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
•	Total Yeas: 12	Total Nays: 0)		

Appearances:

Poet Laurete Commission Juarez, Lena (Lobbyist) - Waive In Support Florida Humanities Council P.O. Box 10390 Tallahassee FL 32302

Phone: 850-212-8330

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

Print Date: 1/31/2012 4:13 pm

AMENDED

CS/HB 1481: Loxahatchee Groves Water Control District, Palm Beach County

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	· X				
Jeff Clemens	X				
Janet Cruz	X				
Ana Logan	X				
Debbie Mayfield	X				
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			X		
Kenneth Roberson			X		
Irving Slosberg	X				
Cynthia Stafford	X				
Barbara Watson	X				
Dana Young	X				
Jimmy Patronis (Chair)	X				
	Total Yeas: 13	Total Nays: 0			

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

PCS for HB 365: Public Retirement Plans

	Yea	Nay	No Vote	Absentee Yea	Absentee Nay
Larry Ahern	X				
Douglas Broxson	X				
Jeff Clemens		X			
Janet Cruz		Х			
Ana Logan			X		
Debbie Mayfield		Х			
George Moraitis, Jr.	X				
Bryan Nelson	X				
H. Marlene O'Toole			Х		
Kenneth Roberson	X				
Irving Slosberg		X			
Cynthia Stafford		X			
Barbara Watson		X			
Dana Young	X				
Jimmy Patronis (Chair)	X				

Total Nays: 6

Total Yeas: 7

Appearances:

Adams, Leticia (Lobbyist) - Waive In Support Florida Chamber of Commerce 136 S. Bronough St. Tallahassee FL 32301 Phone: (850) 521-1279

Pension

Givens, Dan - Waive In Opposition Miami Fire Fighters' Relief & Pension Fund 9941 SW 130 St Miami FL 33176 Phone: 305-253-2442

Parker, Ken - Information Only City of Port Orange

Municipal Fire and Police Pension Suarez, Robert - Opponent Florida Professional Fire Fighters 345 W. Madison Street Tallahassee FL

Caddell, Tim - Waive In Support City of Pinellas Park 5851 Park Blvd Pinellas park FL 33781 Phone: 727-541-0721

Print Date: 1/31/2012 4:13 pm

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

PCS for HB 365: Public Retirement Plans (continued)

Appearances: (continued)

Muni Pensions Vroman, Kurt - Waive In Opposition Deltona Fire Fighters 318 Columba Rd DeBary FL 32713 Phone: 386-235-6765

Bell, Douglas (Lobbyist) - Waive In Support

City of Ormond Beach 215 S. Monroe Street Tallahassee FL

Phone: (850)222-3533

Public Employees
Tolley, Jim - Opponent
Florida Prof. Fire Fighters
345 Madison Street
Tallahassee FL 32301

Conn, Kraig (Lobbyist) - Proponent Florida League of Cities 301 S. Bronough

Tallahassee FL 32301 Phone: 850-222-9684

Police/Fire Pensions

Brinkman, Keith (State Employee) - Information Only

DMS/Retirement 1317 Winewood Blvd. Tallahassee FL

Phone: 850-488-2784

Milita, Dale - Waive In Support

City of Bartow 36910 3rd Street Canal Point FL 33438 Phone: 561-924-7702

Henning, Lisa (Lobbyist) - Opponent Florida Fraternal Order of Police 242 Office Plaza Dr Tallahassee FL 32301

Phone: (850)656-9881

Municipal Pensions

Puckett, Matthew (Lobbyist) - Opponent Florida Police Benevolent Association, Inc 300 E Brevard St Tallahassee FL 32301

Phone: (850)222-3329

Print Date: 1/31/2012 4:13 pm

Page 26 of 28

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

PCS for HB 365: Public Retirement Plans (continued)

Appearances: (continued)

Vanassche, Connie (Lobbyist) - Waive In Support City of Okeechobee 36910 3rd Street Canal Point FL 33438 Phone: 561-924-7702

South Florida Council of Fire Fighters Parkerson, Dean - Opponent South Florida Council of Fire Fighters 8000 SW 21st St #205 Miami FL 33122 Phone: 305-525-6250

Goodwin, Lori - Waive In Opposition Fraternal Order of Police Milton FL

Government Operations Subcommittee

1/31/2012 9:00:00AM

Location: Morris Hall (17 HOB)

AMENDED

Workshop

Draft legislation amending section 288.075, Florida Statutes, which provides public record exemptions for economic development agencies

X Workshopped

Print Date: 1/31/2012 4:13 pm