Inventory of the California State Assembly Public Employees, Retirement, and Social Security Committee Records

Collection number: See series descriptions for LP numbers

California State Archives
Office of the Secretary of State
Sacramento, California

Processed by:
Colin Hoffman
Date Completed:
1 December 2007
Encoded by:
Jessica Knox

© 2007 California Secretary of State. All rights reserved.

Descriptive Summary
Title: California State Assembly Public Employees, Retirement, and Social Security Committee Records
Dates: 1969-2000
Collection number: See series descriptions for LP numbers.
Creator: Assembly Public Employees, Retirement, and Social Security Committee
Assembly Public Employment and Retirement Committee
Assembly Employment and Public Employees Committee
Assembly Public Employees and Retirement Committee

Collection Size: 30 cubic feet of textual files and 239 audio cassette tapes
Repository: California State Archives
Sacramento, California

Abstract: Since 1969, the Assembly has continually established a committee related to public employment, retirement, and social security. The committee's name and responsibility have changed since this time. The overall scope and responsibilities of the committee have essentially remained the same since its inception, focusing primarily on issues related to retirement, health care, and employment issues involving State employees. The California State Assembly Public Employees, Retirement, and Social Security Committee records consists of 30 cubic feet of textual records of the Assembly Public Employment and Retirement Committee, the Assembly Employment and Public Employees Committee, the Assembly Public Employees and Retirement Committee, and the Assembly Public Employees, Retirement, and Social Security Committee.

Physical location: California State Archives
Languages: Languages represented in the collection: English

Access
While the majority of the records are open for research, any access restrictions are noted in the record series descriptions.

Publication Rights
For permission to reproduce or publish, please contact the California State Archives. Permission for reproduction or publication is given on behalf of the California State Archives as the owner of the physical items. The researcher assumes all responsibility for possible infringement which may arise from reproduction or publication of materials from the California State Archives collections.

Preferred Citation
[Identification of item], Assembly Public Employees, Retirement, and Social Security Committee Records, LP[number]:[folder number], California State Archives, Office of the Secretary of State, Sacramento, California.

Acquisition and Custodial History
The State Archives received these records in accordance with California Government Code 9080(b) which requires legislative committees to transfer their records to the State Archives when they are no longer needed by the committee.

Committee History

See series descriptions for LP numbers.
Since 1969, the Assembly has continually established a committee related to public employment, retirement, and social security. The committee's name and responsibility have changed since this time.

The Assembly Committee on Public Employees, Retirement, and Social Security had its origins as an advisory committee to the Joint Legislative Retirement Committee, established by ACR 46 in 1966. It was to offer technical advice and expertise to retirement and actuarial problems, assisting the Legislature with the scores of complex bills relating to the retirement systems that the State contributed to. This committee remained in an advisory role until 1969, when the Assembly Committee on Public Employment and Retirement was assigned the subject matter relating to the State Civil Service System, State personnel, and public retirement systems by House Resolution 414. From 1969 to 1970, the committee was called the Assembly Committee on Public Employment and Retirement. From 1971 until 1973, there was a split, with creation of the Assembly Committee on Employment and Public Employees and a separate committee for retirement. In 1974, with the passage of House Resolution 208 on August 31, there was a reunification of duties with the creation of the Assembly Committee on Public Employees and Retirement. In 1987, it became the Assembly Committee on Public Employees, Retirement, and Social Security and has remained so to the present.

The original advisory committee consisted of members selected by the Speaker of the Assembly and the Rules Committee of the Senate, with no more than three members from each house. The number of standing committee members has shifted over the years, fluctuating from as low as six members in 1999 to as many as eleven in 1975 and 1993-1994. The overall scope and responsibilities of the committee have essentially remained the same since its inception, focusing primarily on issues related to retirement, health care, and employment issues involving State employees. The primary responsibilities of the Assembly Committee on Public Employees, Retirement, and Social Security involve: creating and advising on legislation for the maintenance or revision of retirement plans and formulas for State retirement systems, creating and advising on legislation relating to health care plans for State employees, and crafting the frameworks for regulations and procedures for bargaining between State employees and unions.

The chairs of the committees from 1974-2000 were as follows:
- Fong Eu, March K. (Dem.), 1973-1974
- Dixon, Julian C. (Dem.), 1975
- Deddeh, Wadie P. (Dem.), 1976-1979
- Tucker, Curtis (Dem.), 1980-1982
- Elder, David (Dem.), 1983-1992
- Canella, Sal (Dem.), 1993-1994
- Kaloogian, Howard (Rep.), 1995-1996
- Knox, Wally (Dem.) 1997
- Honda, Mike (Dem.), 1998
- Correa, Lou (Dem.), 1999-2000

**Scope and Content**

The California State Assembly Public Employees, Retirement, and Social Security Committee records consists of 30 cubic feet of textual records of the Assembly Public Employment and Retirement Committee, the Assembly Employment and Public Employees Committee, the Assembly Public Employees and Retirement Committee, and the Assembly Public Employees, Retirement, and Social Security Committee. There are also 239 audiocassette tapes of the Assembly Public Employees and Retirement Committee and the Assembly Public Employees, Retirement, and Social Security Committee hearings. The records were created between 1969 and 2000, with the bulk of records created between 1990 and 2000. The record group is organized into three series: bill files, hearing files, and subject files. See the series description for further details.

Because of the size and complexity of issues relating to health care, retirement, and labor relations with State employees, many topics and issues are contained in the record group including: cost of living adjustments, actuarial evaluations, investment strategies, medical benefits, county participation, safety member classifications, pension abuses, pension plans, and divestment issues.

The bill files are useful for observing the development of State health and retirement systems through technical and formulaic revisions, the expansion of medical and retirement packages and investment parameters, alterations to member and beneficiary classifications, and the crafting of labor agreements. Technical and formulaic revisions include adjustments to the cost of living payments and the mathematical computations for determining retirement ages. The expansion of eligible members' medical coverage includes a debate over inclusion of domestic partner coverage, the eligibility of newly married spouses for death benefits, and the ongoing efforts to bring medical coverage to employees in rural areas or in counties participating under older legislation. The bill files also contain the passing of Memoranda of Understanding (MOUs)
between labor organizations and the State, highlighting negotiations for increased coverage, alterations in employee classifications, and negotiations for wage and benefit modifications.

The subject files are useful for providing background information, individual analyses, public reaction, and correspondence related to matters involving legislation or the operation of State retirement systems. These files include material on pension abuses, namely the American River Fire District. Reforms of State pension plans include the efforts in 1991 and 1992 to initiate structural pension plan reforms and allocate retirement funds to balance the State budget using AB 702 and the accumulation of New York City pension plans for consideration towards potential reforms in California. Investment portfolios and financial solvency reports contain various actuarial and fiduciary reports for the Legislators Retirement System, the Judges Retirement System, the State Teachers Retirement System, and financial evaluations of PERS investment in Catellus provide expanded coverage of the Committee’s attempts to maintain financial solvency of the retirement and health care plans. The investment portfolios also contain information involving the PERS Home Loan Program and correspondence relating to the debate over continued association with companies in South Africa and Arab nations that boycotted Israel.

The hearing files are useful for determining the perspectives of opposing viewpoints comprising the testimonies over CalTrans safety, actuarial valuations and fiduciary reports, the relative strengths and weaknesses of deferred compensation programs, the taxation of pension plans with IRS code 415 and changes to the Federal Medicare Law, efforts to develop low-cost alternatives to PEMCHA, continued PERS investing in South Africa, concerns over PERS investments in Catellus and Drexel, Burnham, and Lambert, and several bill hearings devoted to discussing the technical language and validity of various bill provisions.

**Accruals**

No further accruals are expected.

**Indexing Terms**

The following terms have been used to index the description of this collection in the library’s online public access catalog.

- California State Assembly Public Employees, Retirement, and Social Security Committee
- Retirement
- Cost-of-living adjustments
- Medical care

**Related Collections at the California State Archives**

- Sal Canella Papers
- Lou Correa Papers
- Wadie P. Deddeh Papers
- Julian C. Dixon Papers
- March K. Fong Eu Papers (restricted)
- Mike Honda Papers
- Howard Kaloogian Papers
- Wally Knox Papers
- Curtis Tucker Papers

**Senate Public Employment and Retirement Committee Records**

**Related Collections at other Repositories**

Additional related records may be found in the Julian Dixon Collection of the Public Officials’ Collection at California State University, Los Angeles, Los Angeles, California, 90032-8300.

**Note to researchers**

Researchers interested in this committee are advised to check the papers of its Chairs. Committee Chairs often kept materials relating to committee operations among their personal files. For Chair papers available at the California State Archives or other repositories, this information can be found in the committee history.
Series 1 Bill Files 1971-2000

See LP Numbers below.

Series 1 Bill Files 1971-2000

Physical Description: 162 file folders

Arrangement

Arranged chronologically by legislative session then numerically by bill number within legislative house.

Scope and Content Note

Most bill files include all or some of the following items: bill analyses, amendments and resolutions, author’s statements, testimony, press releases, newspaper clippings, correspondence, roll calls, records of votes, and committee statements. Of particular interest are those bills relating to safety member and employee classifications, modifications to the Public Employees Medical and Hospital Care Act and retirement formulas, and labor relations.

Assembly Employment and Public Employees Committee:

1971: AB57-AB3006, ACA1-ACA53, ACR39-ACR150 (1ff) LP377:1
1971: SB303-SB1303, SCR35-SCR74 (1ff) LP377:2
1972: AB18-AB2356, ACA73, ACR28-ACR105 (1ff) LP377:3
1972: SB104-SB1440, SCA67 (1ff) LP377:4

Assembly Public Employees and Retirement Committee:

1975-1976: AB72-AB4508, ACR11-ACR221 (6ff) LP377:5-10
1975-1976: SB72-SB2147, SCR30-SCR91 (1ff) LP377:11
1977-1978: AB66-AB3828, ACR72-ACR129 (3ff) LP377:12-14
1977-1978: SB41-SB2150, SCR27, SJR31-SJR38 (1ff) LP377:15
1979-1980: AB44-AB3468, ACR65-ACR139 (3ff) LP377:16-18
1983-1984: AB91-AB3894, ACR41-ACR120 (2ff) LP377:25-26

Assembly Public Employees, Retirement, and Social Security Committee:

1989-1990: AB46-AB3963, ACA9-ACR84, AJR6-AJR4,AB53X (3ff) LP377:54-56
1993-1994: AB7-AB3832, ACR18-ACR48 (22ff) LP377:144-165
1995-1996: AB166-AB3453, ACA1-ACA42, ACR17 (36ff) LP377:177-212
1999-2000: SB105-SB2122, SCR15 (26ff) LP377:345-370

See series descriptions for LP numbers.
<table>
<thead>
<tr>
<th>LP377:371-448</th>
<th><strong>Series 2 Subject Files 1983-1995</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Physical Description:</strong> 77 file folders</td>
</tr>
<tr>
<td></td>
<td><strong>Arrangement</strong></td>
</tr>
<tr>
<td></td>
<td>Arranged alphabetically by subject headings.</td>
</tr>
<tr>
<td></td>
<td><strong>Scope and Content Note</strong></td>
</tr>
<tr>
<td></td>
<td>Subject files created by the Assembly Committee for Public Employees, Retirement, and Social Security include correspondence, background materials, notes, reports, newspaper clippings, and subcommittee information. Of particular interest are those files related to the Two-Tiered Retirement Plan, Investment Dividend Disbursement Account, fiduciary standards, pension abuses, and investment portfolios.</td>
</tr>
<tr>
<td></td>
<td>For a list of Subject Files, see Appendix A in Additional Series Information.</td>
</tr>
<tr>
<td>See Appendix B for LP numbers.</td>
<td><strong>Additional Series Information</strong></td>
</tr>
<tr>
<td></td>
<td><a href="#">Appendix A: List of Subject Files</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>See Appendix B for LP numbers.</th>
<th><strong>Series 3 Hearing Files 1971-1989</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Physical Description:</strong> 121 file folders</td>
</tr>
<tr>
<td></td>
<td><strong>Arrangement</strong></td>
</tr>
<tr>
<td></td>
<td>Arranged chronologically by date of hearing.</td>
</tr>
<tr>
<td></td>
<td><strong>Access Information</strong></td>
</tr>
<tr>
<td></td>
<td>Access to audiovisual material requires the production of use copies.</td>
</tr>
<tr>
<td></td>
<td><strong>Scope and Content Note</strong></td>
</tr>
<tr>
<td></td>
<td>Hearing files include informational hearings, joint informational hearings, and bill hearings. Files may contain agendas, testimony, transcripts, reports, and background material. Audiocassettes have been separated from the textual files and are stored separately for preservation purposes. Audiocassettes chronicle the interaction of the committee members, subject experts, and individuals as they discuss and debate topics brought before the Committee. The audiocassettes are divided into two types. Bill hearings discuss bills or bill provisions that may need to be amended before being recommended to the Assembly floor. Subject hearings involve specific topics and often contain testimony by experts and relevant individuals. A separation sheet is placed in the folders to alert researchers to the existence of such material.</td>
</tr>
<tr>
<td></td>
<td>For a list of Hearing Files, see Appendix B in Additional Series Information.</td>
</tr>
<tr>
<td></td>
<td><strong>Additional Series Information</strong></td>
</tr>
<tr>
<td></td>
<td><a href="#">Appendix B: List of Hearing Files</a></td>
</tr>
</tbody>
</table>