



June 24, 2005

To: Members and Staff of the State Administration and Veterans Affairs Interim Committee

From: Pat Callbeck Harper, Associate State Director, AARP Montana *pat*

Re: Public Comment on Draft HJR42 Work Plan for the Committee

Thank you for the opportunity to provide a few comments on the HJR42 Draft Work Plan for AARP Montana. AARP Montana is a nonprofit, nonpartisan organization dedicated to financial and health security for Montanans 50 and older, with 146,000 members representing 49% of all Montanans over 50. About 57% of our members are retired and not working. In our last Member Survey in January of this year, 73% listed property taxes as a top priority for legislative action. And 44% of our members live on a gross income of less than \$30,000 annually.

I share this to say that we represent “stakeholders” in outcome of your study and recommendations, and decisions in the special session – specifically public retirees, their adult children who are trying to manage long term care options, and property tax payers.

We appreciate the draft work plan and the calendar and have just a few suggestions as you proceed.

1. On pg. 5, we echo the Budget Director’s and the Legislature’s concerns about the impact of the estimated multimillion dollar problem in significant property tax increases. We are going do what we can to contribute options and ideas that will lessen the impact on our stakeholders. We suggest that at each point of analysis, the Committee consider the impact on retirees, their families and taxpayers.

2. On p. 10, third bullet, we recommend that the Committee add how legislative policy decisions interact to affect *not only employer funding obligations, but public retirees and other stakeholders like taxpayers as well.*

(Starting on pg. 11, stakeholders are mentioned more and more and we appreciate that.)

3. On p. 12, “Phase 2: Narrowing the Focus”: We plan to support the committee with additional questions and information we recommend for consideration in narrowing the focus. We’ll use our national public policy institute to support your work here.

4. On p. 15, Items suggested for the September 2, 2005 meeting this fall: We recommend that an additional item be included – Research and analysis on the impact on public retirees and taxpayers of options already identified, and on the impact if we do nothing.

Thank you for this opportunity, and we look forward to supporting your work ahead.

State Administration  
and Veteran Affairs  
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Exhibit 15