

# NC Legislature & You: Know & Grow RGEA's Advocacy

*How to be an effective citizen advocate*

July 14, 2025



# Government Relations



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## Who We Are



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# Why Advocacy Matters



Citizen voices can influence lawmakers and legislation.

Lawmaker's decisions have a MAJOR impact on Retirees:

- TSERS' Bonuses
- TSERS' COLA's

# Understanding Your Legislature



## Know how your state legislature works:

Two chambers:  
House & Senate

Committees  
shape bills.


Timing  
affects outcomes.



# Types of Advocacy

- Phone calls & emails
- In-person visits
- RGEA Advocacy Events
- Social media campaigns and Call to Actions



 **Retired Government Employees Association**  
Published by Wenever Retire  
March 20

As you read this, the Senate budget is being negotiated and drafted. Last year, the Senate included no cost-of-living adjustments for government retirees. This must change in 2025, and we need your voice.

RGEA uses Fast Democracy as our call-to-action platform. Please take a moment to visit our site by clicking the link below. From there, you'll be able to complete a call-to-action to let the Senate know that government retirees need relief from inflation to meet their daily expenses and maintain their quality of life.



RGEA.INFO

**Let Your Voice Be Heard By The Senate Now!**

RGEA expresses deep concern that the Governor's recently released budget does not protect t...

# What Are Key Components for LGERS Advocacy?

- Investment Returns Pension Plan  
(Based on preceding three years)
- Statutes, including understanding limitations of LGERS Trustees
  - The determination of whether there are sufficient investment gains to cover the possible postretirement increase in allowance *shall reside exclusively within the discretion of the Board of Trustees.*\*
  - Shall be informed by the findings within the annual actuarial valuation reports.
  - Take into account both the rate of the record of investment gains or losses during the preceding three-year period.





# LGERS Advocacy

- Maintain Awareness of Pension Performance Results in Comparison to Peer Public Plans
- Provided in each issue of *Living Power*
- Advocate for modifications to the pension as needed
  - Example, 2020 change to allow awarding of bonuses (G.S. 128-27 k(1)).

## 2024 NORTH CAROLINA PERFORMANCE ANALYSIS

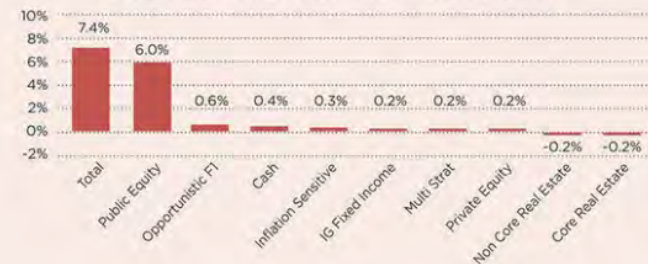
*Note: RGEA has retained the financial analytics firm AS Investment Management to provide our members with insights on their pensions' performance related to benchmarks and comparisons to peer public pensions.*

*The summary of 2024's investment performance below is just a sample of the type of work AS Investment Management is providing to inform and empower you in regarding to your pension fund. —Tim O'Connell, RGEA Executive Director*

The North Carolina Retirement System (NCRS) returned 7.43% in 2024, outperforming its 6.5% annual return target. The portfolio's performance was largely driven by Public Equity, while Core and Non Core Real Estate were the only two of nine asset classes with negative return contributions.

2024 was a strong year for US equities, with the S&P 500 gaining 25.0%—its second consecutive year of 20%+ returns. This was led by Big Tech, with the Communication Services and Technology sectors up 40.2% and 36.6%, respectively. Fixed income markets were generally lackluster, weighed down by persistent inflationary concerns. The impact of alternatives on portfolio performance was minimal due to their smaller allocation relative to public market assets.

### 2024 PERFORMANCE CONTRIBUTION BY ASSET CLASS



Source: North Carolina Treasurer's Office, Addepar Analysis

## Legislative Update

### SUMMARY AND NEWS

The North Carolina General Assembly operates on a biennial schedule. In odd-numbered years, they convene for the "long session," which typically runs from January through mid-March. During this session, lawmakers address various legislative matters, including adopting a biennial budget.

In contrast, in even-numbered years, the "short session" is conducted to modify the budget approved during the long session and discuss bills previously "passed over" between the House and Senate. Until a modified budget is approved, the previous funding plan provided to the biennial budget remains in effect. At the time of this publication, the General Assembly is still in its short session.

As a reminder, the 2023-2024 biennial budget included:

- A 1% increase in the State Retirement System (effective July 1, 2023)
- A 1% increase in the State Retirement System (effective July 1, 2024)

The Office of State Budget and Management and the General Assembly's Fiscal Research Division submitted a revised Governor's budget to the General Assembly in May, projecting a \$987 million surplus beyond planned revenue.

In the current short session, the Governor, House, and Senate have each submitted budgets. However, the House and Senate have not yet agreed on a final budget this session, debating whether to provide additional funding for the next session or simply maintain the status quo.

**Key details for you to know are:**

- The Governor's budget included a 1% rate-of-return supplement for state retirees. (This would deliver an average of \$600 to each retiree as a cost of approximately \$170 million.)
- The House budget was approved with a 1% rate-of-return supplement for state retirees (this would deliver an average of \$420 to each retiree as a cost of approximately \$114 million).
- The Senate's budget was approved without any supplement or rate-of-return adjustments.

It should be noted that several bills have been introduced in the budget sessions, including bills with cost-of-living adjustments (COLA) for seniors (\$10,000, \$10,000, \$10,000). However, none of these bills made it beyond the Appropriations or Public Committee. In the Local Government Retirement System (LGERS), the General Assembly provides limited authority to the Trustees to amend COLA as pension

supplements, and their decisions can be overridden by the General Assembly enacting legislation to provide for a larger or smaller increase for LGERS retirees.

**WHAT CAN YOU DO TO MAKE A DIFFERENCE?**

Since the legislature has power to override any budget vote by the Governor, your participation with your legislators is imperative. If you have responded to NCRGEA's recent call to action email campaign, we thank you. If you have not already, you can still make a difference by completing the call-to-action email or by calling and/or writing your Senator and letting them know that you value their support of the House's proposed budget, which includes the 1% pension supplement to state retirees. You can easily find out who your Senator is by going to [NCRGEA's website/finding-legislators](https://www.ncleg.gov/legislative/finding-legislators).

**More:** NCRGEA has and always will advocate for the best interests of living and future retirees. Pension supplements are appreciated but fall short of committing the longer-term impact of inflation on state and local employees' lives experienced in the past decade. NCRGEA looks forward to bringing this position forward again with the General Assembly and Trustees in the coming months.

**Other News:**

On the State Health Plan front, in 2023, the Human Resources Administration (HRA) announced that it would increase the State Health Plan's rate of return from 5.0% to 5.5% in 2025 for those who are not fully vested and their dependents. Those who are fully vested will not be impacted by this increase. Among health care workers, understanding of the State Health Plan is critical as factors in this increase. In the most recent State Health Plan Trustees' meeting, Treasurer Ede Holmquist shared that the 2023-2025 budget increased \$200 million less than requested to cover the State Health Plan.

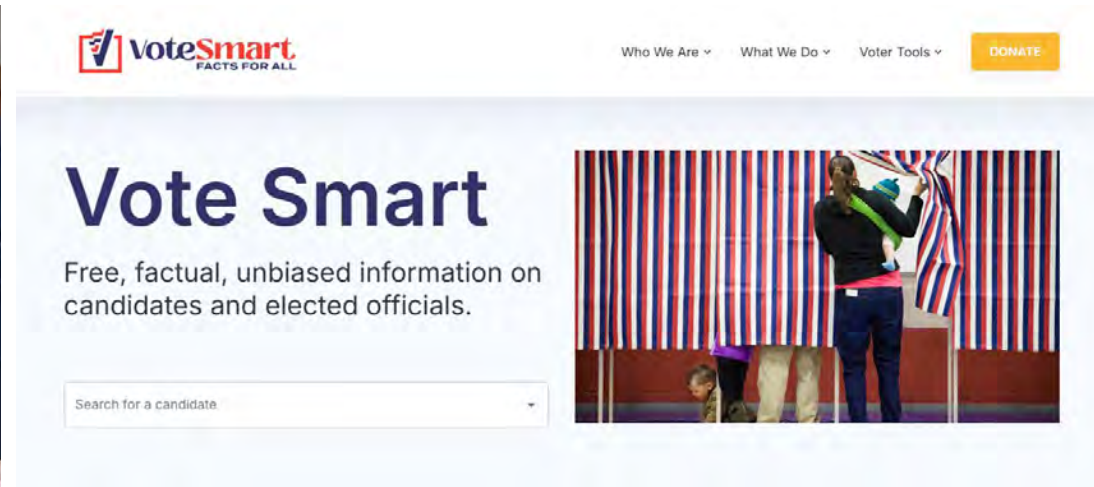
NCRGEA has been informed that the next cost-of-living adjustment (COLA) for State Health Plan Teachers and State Employees has been postponed from October 2024 until March 2025 due to a judicial calendar conflict. For more information on the case status and details, we advise you to go to [LakeCrestCase.com](https://www.LakeCrestCase.com). This site is hosted by the law firm representing the plaintiffs in this case, Jason Lowant. NCRGEA looks forward to seeing this case brought to closure and the government workers impacted by this case fully compensated for their lost benefits.



# Build Relationships



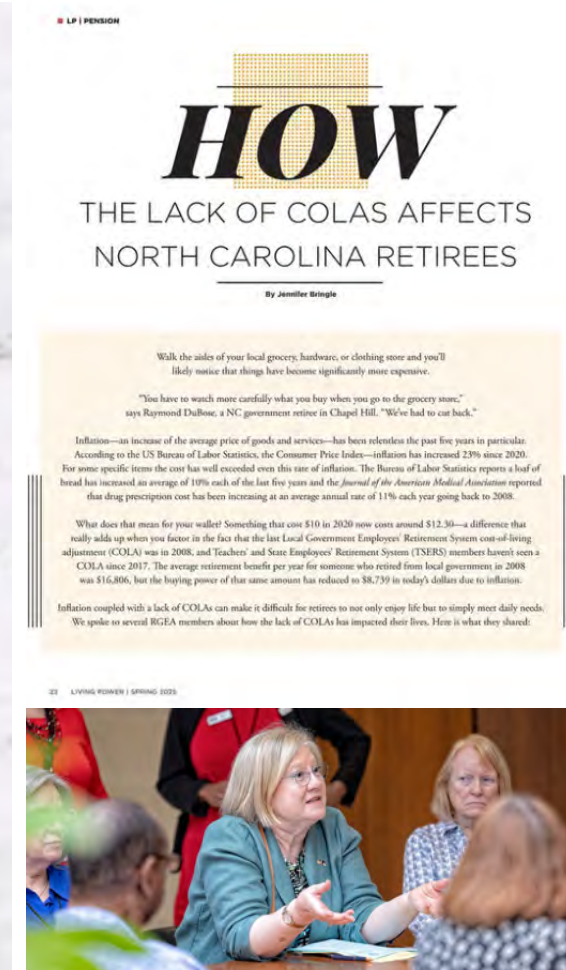
- Get to know your legislators.
  - [www.votesmart.org](http://www.votesmart.org)
  - [www.Ballotpedia.org](http://www.Ballotpedia.org)
- Respect their staff.
- Be polite, patient, and persistent.





# Know Your Issues

- Do your homework.
- Understand the policy.
- Use data and statistics.
- Tell your story.





# Telling Your Story



- Make it personal and clear.
- Be brief but specific.
- Share how your life has been affected.
- Share how your local community has been affected.



# Already Know Your Legislator?

- Contact them to meet with you in their own districts.
- This is more personable and highly effective.



# Timing is Everything

Employee Portal | Find Your Legislators | Contact Info

**NORTH CAROLINA GENERAL ASSEMBLY**

HOUSE SENATE AUDIO CALENDARS COMMITTEES GOV OPS BILLS & LAWS DIVISIONS REDISTRICTING ABOUT

Home / Calendars / Legislative Calendar

LEGISLATIVE CALENDAR

For: Current calendar

THU 7/10	Thursday, July 10, 2025		
	10:00 AM	Senate: Session Convenes	Senate ENDED
	10:30 AM	House: Session Convenes	House ENDED
MON 7/14	Monday, July 14, 2025		
	10:30 AM	House: Session Convenes	House   STREAM
	3:00 PM	Senate: Session Convenes	Senate   STREAM
THU 7/24	Thursday, July 24, 2025		
	2:00 PM	America's Semiquincentennial Committee	1228/1327 LB   STREAM

- Learn the legislative calendar.
- Act early in the session.
- Don't wait until the vote is scheduled.





# Working with Others

- Teamwork amplifies your voice.
- Join with other RGEA members to advocate.
- Coalitions show broad support.





# Common Mistakes to Avoid



- Don't assume they know your issue.
- Avoid anger or threats.
- Stay on script.
- Be persistent.



# ■ So, Are You Ready?

## Ready to advocate?

*Here are four ways to get started.*

1

Contact your legislator:

**[www.ncleg.gov](http://www.ncleg.gov)**

**[RGEA.info/advocacy/findmylegislator](http://RGEA.info/advocacy/findmylegislator)**

2

Follow our current and past  
legislative updates at

**[RGEA.info/news-from-jones-street](http://RGEA.info/news-from-jones-street)**

3

Join RGEA advocacy efforts.

4

Sign up for alerts at [RGEA.info](http://RGEA.info)

# Thank You!

Let's work together for a stronger future.

**Questions? Contact:**

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Keep up with our weekly Legislative updates:  
[rgea.info/news-from-jones-street](https://rgea.info/news-from-jones-street)

