

NCRGEA Advocacy Goals 2024



Linda Suggs and Jessica Kozma Proctor

February 7, 2024



2024 Advocacy Goals

Today's Learning Questions:

- ✓ What is the “short” session?
- ✓ What are our goals for 2024?
- ✓ What can you do?

2024 Legislative “Short” Session

- ✓ The North Carolina General Assembly’s legislative sessions are coupled into two-year sessions called biennium sessions
- ✓ The two-year biennium sessions begin in odd years and are referred to as the “long” session. The second year is the “short” session.
- ✓ A majority of legislative work is done during the long session, when a two-year budget is adopted.
- ✓ Short sessions typically take up budget adjustments to budget passed in the prior year, technical corrections, and other “clean up” items.



How Does NCRGEA Determine its Advocacy Goals?

- ✓ We listen to our members
- ✓ We gather information from staff
- ✓ Our lobbyists and staff create a first draft
- ✓ The Government Relations Committee studies the drafted goals and forwards their revised goals to the Executive Committee for consideration
- ✓ The Executive Committee scrutinizes the recommended advocacy goals and either sends back to the Gov't Relations committee or recommends the goals to NCRGEA's full Board of Directors
- ✓ The NCRGEA Board votes on the recommended goals



2024 Advocacy Goals

1. Advocate for annual cost of living adjustments for all state and local government retirees.

- A true COLA is always our top priority
- We fall back on bonuses only when it becomes clear a COLA is not viable



2024 Advocacy Goals con't

2. Strengthen and protect the state's defined benefit plan to attract and retain the best and brightest public servants.



2024 Advocacy Goals con't

3. Defend public sector benefits so all public sector retirees can participate in traditional retirement systems.



2024 Advocacy Goals con't



4. Ensure the State of North Carolina will continue to fulfill its constitutional and legal requirements to fully fund North Carolina Retirement Systems and the State Health Plan.

- This is the “Annual Required Contribution”
- Was over \$12 million for 2023
- Over \$15 million budgeted for 2024

2024 Advocacy Goals con't



5. Expand the Bailey tax exemption to all state and local retirees and pursue other tax exemption opportunities for government retirees.

- Some appetite for this in NC House & Senate in previous years
- An aside: “You earned it, you keep it” introduced in U.S. House in January would exclude Soc. Security benefits from taxable income

Past, Present, and Future Efforts

- Always, our top priority is getting more money to your pension to keep up with inflation!
 - Our goal is a true COLA
- Past three years: a total of 10 percent in bonus money for TSERS. 2 percent for LGERS.
 - 2023: TSERS - 4 percent bonus
 - 2022: LGERS - 2 percent bonus
 - 2022: TSERS - 2 percent bonus
 - 2021: TSERS - 4 percent bonus
- Money for LGERS presents huge challenges



How Can YOU Help?

- Get to know your local legislators personally
- Use the links on NCRGEA website to get valuable information
 - Find your legislator
 - Contact information
 - Committees – esp. House & Senate pensions memberships
- Use Bill Tracker to keep up with important legislation
- “Become An Advocate”



FastDemocracy

- Use the FastDemocracy search box on our website to keep up with your legislators. You'll find:
 - contact information
 - district map
 - sponsored bills
 - voting history
 - news stories
- FastDemocracy can also help you find your legislators – both in NC and in U.S. Congress
- Plus - NCRGEA uses FastDemocracy for calls to action
- 6,327 NCRGEA members use FastDemocracy



Example: FastDemocracy



Tell the Senate State Retirees NEED A COLA!

Dear Advocates,

The House and Senate continue to negotiate the budget as part of the conference budget process on key areas, including the allocation of surplus funds for government retirees for either a cost-of-living adjustment or bonus. The House has proposed a 2% **COLA** increase over the next two years while the Senate has proposed a 2% **one-time bonus** over the next two years. Our lobby team is continuing to have focused conversations with key leaders in both the Senate and the House to ensure that the needs of retirees are remembered when the final budget is approved. As members of NCRGEA, you can make a difference by completing this call-to-action email request. Please remember, you have the option to personalize your message in our provided email letter. Use the panel to the right to enter your information and complete

Tim O'Connell
Executive Director

Take action now

Your First Name *

Your Last Name *

Email address *

Confirm your email address *

Next >>

More Important Actions

- Be well educated! Know the issues!
- Read Living Power carefully
 - How a New State Law Could Impact Pensions
 - UNC Healthcare and ECU Health Weaken Pension
 - North Carolina Taxpayers Could Be Liable for Billions if Lawmakers Fail to Remedy Provisions of the '24 Budget
- Mark your calendar for MAY 1 – NCRGEA Advocacy Day at the General Assembly – and COME!!



Elections Are Important

- Talk to your local candidates – learn their positions and educate them on your issues
 - Be among the first to congratulate them if they win – especially if it's their first race
- Pay close attention to the State Treasurer's race and candidates' answers to NCRGEA's questions
 - NC's Treasurer is "sole fiduciary" (Treasurer is sole fiduciary in only 3 states!)
 - NCRGEA survey will be in Living Power
 - Winners of primary will be invited to the NCRGEA district conference in Raleigh on April 1 and 2
- Then be sure to VOTE!!
 - Primary election is March 5
 - Early voting begins February 15 and ends March 2
 - General election is November 5



Final Thoughts



- NCRGEA needs YOU to be knowledgeable and involved
- Study the candidates – especially those running for Treasurer
- VOTE!!!
- Build relationships with your local legislators
- Keep your email address updated

Questions??



And thank you for joining us today!