

Living power

For all who have made a living and now wish to make a life

Board of Trustees Adopt Goals for 2008 Session

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IN THIS ISSUE:

News & Views:

*HearPo Hearing Aid
Discount Program 1*

General Assembly

Session Begins 4

*List of 2008 Senators
and Representatives 6*

Strategic Planning

Committee Recommends Goals 9

*SHIIP Needs Volunteers to Navigate
NC Medicare System 11*

The Board of Trustees of the State Retirement Systems adopted legislative goals for the upcoming Session of the General Assembly at the Board's regular quarterly meeting that was held on April 17, 2008. The legislative recommendations address Cost of Living Adjustments (COLAs) for both retired state and local government employees. The Board also adopted a position in support of a shorter separation from service requirement for retired public school teachers who wish to return to full-time work in the classroom.

NCRGEA Executive Director Ed Regan asked the Board of Trustees to support Cost of Living Adjustments of 4.1 percent for both local and state retirees (including judicial retirees) to cover the rate of inflation. He pointed out that Cost-Of-Living Adjustments for all groups of governmental retirees had been less than the rate of inflation as measured by the Consumer Price Index (CPI) for the past several years. As a result, the buying power of retiree pensions had been steadily reduced.

Benefit Enhancements for Retired Teachers and State Employees

The NCRGEA statement on COLAs for retired teachers and state employees was one component of a broader effort launched by the Retirement Systems Roundtable to improve the condition of the Teachers' and State Employees' Retirement System (TSERS). The Roundtable is a coalition of organizations representing retirees and active employees, including NCRGEA. The Roundtable has adopted a three-year plan to:

- increase the TSERS employer contribution rate to 6.0%,
- raise the retirement accrual factor from 1.82% to 1.85% to achieve parity with the local government retirement system, and
- provide annual Cost-Of-Living Adjustments for retired teachers and state employees that are equal to the rate of inflation or to the raises granted to active state employees, whichever is higher.

(Continued on page 3)



NCRGEA News & Views: HearPO Hearing Aid Discount Program

One thing we noticed in the Member Surveys, that was included in the January-February issue of *Living Power* and returned to us, were the number of members who were not familiar with some of the benefits of being a member of NCRGEA. We will try to highlight some of our benefits in upcoming issues of our newsletter so you may utilize all the services and benefits available by being a member in the NCRGEA.

Hearing loss is like any medical problem. The earlier you address it, the easier it is to help. The most important first step is to get a hearing screening to determine the type and extent of a suspected hearing problem.

The North Carolina Retired Governmental Employees' Association is pleased to offer all NCRGEA members and their families the HearPO Hearing Plan.

Based on the request of many members to add a hearing plan, in 2005 the staff of NCRGEA conducted an extensive search and upon completion, recommended to the Board of Directors the HearPO Hearing Plan.

This plan, adopted by the Board of Directors of the North Carolina Retired Governmental Employees' Association, offers discounts on many necessary hearing instruments and related services.

This plan is provided at no cost to the NCRGEA member, spouse and extended family.

How the Plan Works

The plan is simple. After calling HearPO (888-HEARING or 888-432-7464) and finding your nearest local provider, you then call and make an appointment with that provider. At your appointment, you will receive a comprehensive hearing evaluation at a discounted price. If you need a hearing instrument, the provider will fit you with one. The instrument is ordered. There is a sixty day evaluation period from the date of purchase.

HearPO is the largest benefits provider in the United States and boasts more than 1400 provider locations. HearPO Hearing Plans offer hearing instruments including Siemens, Sonic Innovations, Phonak, Rexton, Unitron and more. Discounts range from 20 percent to 60 percent.

If you already have a hearing aid, this program also discounts batteries for existing hearing aids. One member called to tell us that he had saved over \$2,000 when ordering his hearing aid by using this program!

If you have any questions about the plan or need more information, please call 888-432-7464 or go to www.HEARPO.com.

Don't put off your hearing problem-- it's probably not going to go away.

Living Power is published to provide current information for NCRGEA's membership. Newsletters are printed bimonthly and mailed to all members of NCRGEA. Your comments are welcome.

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Board of Trustees Adopt Goals for 2008 Session *(from page 1)*

The Roundtable's specific goals for the 2008 legislative session were presented to the Board of Trustees by Lacy Presnell of N.C. Retired School Personnel. These goals call for a 4.1% COLA, a two-point increase in the retirement accrual factor (to 1.84%), and an increase in the state employer contribution rate to at least 4.8% of state payroll. Other members of the Roundtable spoke in support of the proposals, including Ed Regan representing NCRGEA, Colleen Borst speaking for NCAE, and Ardis Watkins of SEANC.

The Board of Trustees have supported the three-year plan since it first was presented in 2007. The Trustees voted again this year to support both the Roundtable's 3-year plan as well as the specific goals for 2008.

The proposals face an uphill struggle in the General Assembly. The Teachers' and State Employees' Retirement System has only enough undistributed gains to support a 1.28% COLA. The General Assembly would have to appropriate an additional \$115 million to cover a 4.1% COLA. The increase in the retirement accrual rate to 1.84% would cost an additional \$104 million.

Retired Local Government Employee COLAs

This year, the NCRGEA and other groups representing local government employees asked the Board of Trustees to support a 4.1% COLA for local retirees and an increase in the contribution rate

paid by local governments to the Local Governmental Employees' Retirement System (LGERs). In comments to the Board, Mr. Regan stated that COLAs granted to both local and state retirees during the past several years had not kept pace with inflation. While the LGERs had consistently generated higher gains than the state system, these gains still were less than the rise in the actual cost of living. Additional funding for the system was needed.

In his presentation to the Board, Regan pointed out that the Association had refrained in the previous three years from requesting an increase in the local government employer contribution rate in the belief that growth in the local retirement fund eventually would offset this gap. However, given the fact that the gap had not closed, the Association now asked the Board to support a local contribution rate increase in 2008 from the current 4.8% to 5.1% of payroll.

The NCRGEA proposal also received strong support from the Professional Fire Fighters and Paramedics of North Carolina. Dave Anders spoke for this local government employee organization and pointed out to the Board of Trustees that the purchasing power of local pensions had eroded during the past five years as inflation had outrun the growth in LGERs.

The Board declined to recommend an immediate increase in the local employer contribution rate. Instead, the Board approved a motion that contains the following recommendations:

- ◆ provide a 2.17% COLA for local re-

tirees in 2008, utilizing all available gains in the LGERS for this purpose, and

◆ requests that the two organizations representing local government employers study the issue of a higher contribution rate and bring a recommendation for action to the Board in January, 2009. (These two employer organizations, the NC League of Municipalities and the Association of County Commissioners, agreed to the study.)

The Local Governmental Employees' Retirement System has a sufficient amount of gains to cover the 2.17% COLA. The proposed increase in the local employer contribution rate to 5.1% of payroll would have cost an additional \$14 million spread among over 600 participating local government units. The LGERS employer contribution rate has not been changed since 1997.

2008 Session

The rules of the General Assembly set limits on the introduction of new legislation and the consideration of proposed legislation carried over from 2007. However, the rules do allow the introduction and consideration of bills affecting the retirement systems. The recommendations of the Board of Trustees will be introduced as an agency bill in the opening days of the session. We will keep our members informed of progress on this legislation through our toll-free Hot Line at 1-800-356-1190 and our weekly e-mail Legislative Reports.

- Ed Regan

General Assembly Session to Begin on May 13 – Contact Your Legislators!

The General Assembly reconvened on May 13 for what is expected to be a very short session. Once again, the size of the Cost-Of-Living raises for retired teachers and state employees will depend on the willingness of the General Assembly to provide supplemental appropriations to fund a 4.1% COLA. It is important that legislators hear from retirees in their districts on the importance of keeping our pensions current with the skyrocketing rise in cost of fuel, food, and clothing. The accompanying list shows the current preferred contact information for every member of the General Assembly. We urge our members to make our needs known to their state Senators and Representatives.

All indications are that the General Assembly will make this session as short as possible for a number of reasons. Usually, the short session focuses on adjustments to the state's 2-year budget and limits the consideration of other legislation. Also, it appears that the economic slowdown will limit the amount of new revenues available to fund additional state spending. Finally, many legislators are involved in contested elections in November and will want to begin re-election campaigns as early as possible.

We face a serious challenge to convince legislators of the importance of our requests given the limitations on time and

available revenue. The General Assembly must appropriate an additional \$115 million to fully fund a 4.1% COLA for retired teachers and state employees. Without this money, there is only enough funding from gains in the state retirement system to cover a 1.28% COLA in 2008.

Again, there is no substitute for “grass roots” contact with your state legislators. It is important that the General Assembly give high priority to the needs of our retirees as they weigh the many competing demands on the state budget.

Grassroots Lobbying

So, what do we mean by “grass roots lobbying”? This simply means the process of taking the time to contact your local legislators and reinforcing the priorities of the Association. There are several ways to do this. Three quick tips of things to remember if you decide to get in touch with your representatives: Be Polite, Know your Topic, and Personalize the Message. Let your legislator know why this issue is important to you and how you are affected. Remind him/her that you are one of his/her constituents and would appreciate support.

How should you do this? One of the most effective ways is face-to-face. If you would like to visit your legislator, make an appointment first. Be brief, honest and reasonable. You may also want to call your legislator. We have included preferred phone numbers on pages 6 - 8 for your use. You may want to jot down the points you wish to convey before you call.

Another effective way to communicate

is with writing a letter. Preferably, the letter should be handwritten, but legible. General Assembly members receive so many emails that a hand written note gets more attention. Include your full name, address and phone number. Try to keep your letter under one page. Be concise and direct and describe how the issue personally affects you.

The final way to communicate, and perhaps one of the easiest, is via email. Include specific bill numbers and titles. Be concise and straight forward. And, don't forget to Spell Check. FYI, the North Carolina General Assembly main website is www.ncleg.net.

Remember, we lobby on your behalf but nothing can replace a constituent's personal contact. Hopefully these tips will help you feel comfortable and ready to get started.

Editor's Note: If you have internet access, you may go to our website at www.ncrgea.com to sign up to receive our weekly legislative update. Over 3,500 of our members have already signed up to receive this service. The report is sent to members via email on Friday afternoons while the North Carolina General Assembly is in session, with a summary of events which occurred that week. We do not share our email addresses with anyone.

If you are one of the many members who do not have email, don't worry about being left out. If you do not have internet access and want this weekly service, you may call our tollfree number, 1-800-356-1190 and ask for our “Legislative Hotline”. If it is after hours or on the weekend, our automated phone service will prompt you with easy directions of how to listen to the summary.

2008 N.C.

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Strategic Planning Committee

Recommends Goals

The Association's Strategic Planning Committee met on April 30 and adopted a set of six long-range goals. These goals, which are outlined below, are intended to guide the development of the Association during the next five years. The Committee sought to account for both the needs of our current members and the interests of the large group of "Baby Boomers" who now are reaching retirement age.

Goal 1: Evaluate and update the use of Information Technology by the Association to better meet the needs of current and prospective members

The growing use of modern information technology by retirees suggests that the Association should move quickly to adopt new means of communicating with members, recruiting new members, promoting the Association's legislative agenda, and delivering services.

Objective 1a: Retain the services of an information technology consultant to evaluate existing capabilities and to recommend short-term improvements

Objective 1b: Develop a staff inventory of existing technology issues, weaknesses, and needs

Objective 1c: Develop an initial implementation plan to be incorporated in the 2008-09 budget

Goal 2: Monitor, strengthen, and maintain the integrity of the retirement

systems and other retiree benefits.

Recent efforts to control the costs of the State Health Plan, new requirements to account for the accrued liability of post retirement benefits, and the abandonment of defined benefit retirement plans by private sector employers underscore the importance of the Association's central mission to protect the integrity of existing benefits for our members.

Objective 2a: Continue involvement with the State Health Plan Member Roundtable with special emphasis on the development of options for Medicare eligible retirees (2008-09)

Objective 2b: Meet with the State Treasurer-elect to promote a close working relationship with the Association and other partner organizations.

Goal 3: Strengthen and expand advocacy by increasing involvement of members

The Association has a potentially strong "grass roots" advocacy network, with a large membership base distributed across the state as well as a significant number of members who have both strong links to members of the General Assembly and a familiarity with the legislative process. This network should be developed gradually and utilize the organization's considerable member talents in training other members to participate in the lobbying process.

Objective 3a: Publish the quarterly report of the Treasurer's Investment Advisory Committee in the Association

(Continued on next page)

newsletter (initiated March, 2008)

Objective 3b: Develop a strategy and schedule to involve selected members in training on advocacy techniques (January, 2009)

Objective 3c: Continue the development of the Key Member Legislative Contact list

Objective 3d: Invite member feedback on improvements to electronic Legislative Report

Goal 4: Increase marketing and outreach to attract new members

Objective 4a: Develop incentives for membership (possible approaches include affiliate membership and spouse membership)

Objective 4b: Advertisements in employee publications/SECU/sister organizations

Objective 4c: Strengthen relationship with HR directors

Objective 4d: Develop news, press releases, PSAs for local news outlets

Goal 5: Strengthen outreach and education to members, prospective members and legislators.

Objective 5a: Plan legislative breakfast/reception at start of 2009 legislative session

Objective 5b: Meet with newly elected legislators prior to session

Objective 5c: Develop member benefits article in the newsletter two times a year and in the annual membership renewal notice

Goal 6: Strengthen and broaden marketing and communications to enhance identity of the Association.

Objective 6a: Engage the services of a marketing consultant (2008-09)

Objective 6b: Revisit possible development of a DVD as a marketing tool for pre-retirement seminars and employee benefit conferences

CONTINUATION OF THE STRATEGIC PLANNING PROCESS

These goals are part of the strategic plan that will be presented to the Association's Executive Committee on May 20. Final review and approval by the Board of Directors is slated for June 24.

The plan recommended by the Strategic Planning Committee stresses the importance of an ongoing planning process. The Committee will have a meeting in the Fall to identify the reasons why some new retirees choose not to join the Association and to examine the specific interests and needs of active governmental employees who are nearing retirement.

- Ed Regan

Summer Hours

The Association's office will be closed on Monday, May 26 for Memorial Day, Friday, July 4, and Monday, September 1 for Labor Day.

In addition, beginning the week of Memorial Day and ending the Friday before Labor Day, the Association's office will be open Monday - Thursday from 7:30 a.m. - 5:00 p.m. and on Fridays from 7:30 a.m. - noon.

SHIIP Needs Volunteers to Help North Carolinians Navigate Medicare System

The North Carolina Seniors' Health Insurance Information Program, or SHIIP, is a flagship program for the Department of Insurance. Recognized as a national model for seniors' information programs, and known to citizens across the state as a reliable resource for clear and unbiased information about Medicare and other issues, SHIIP has grown to serve all 100 counties with hundreds of volunteers since its inception in 1986.

Since baby boomers are now old enough to join the Medicare system, there will be more questions about how to manage Medicare benefits than ever before. In order to continue to offer excellent service to senior citizens and their families in North Carolina, SHIIP needs dedicated and caring volunteers. Can you help? Do you have what it takes to join SHIIP's volunteer force?

Volunteer Counselors must meet several requirements before being accepted in the SHIIP training. You must:

- have the ability to get along well with others;
- have a sensitive and caring attitude;
- have good written and oral communication skills;
- have or be willing to learn computer skills for counseling;
- not be an active insurance agent and not have an immediate family member

who is an insurance agent; and

- have the willingness to learn and the ability to retain information relevant to health insurance provisions and claims filing procedures.

Volunteer Counselors with SHIIP are typically asked to:

- complete the SHIIP Volunteer Basic training course and become a "Certified" SHIIP Volunteer Counselor;
- provide 40 hours of volunteer service per calendar year. Volunteer service includes training, counseling, enrollment assistance and outreach activities;
- attend quarterly follow-up meetings throughout the year, in locations that do not require much travel from your area;
- counsel clients and beneficiaries in your community. Counseling may include telephone calls, meeting with the clients face-to-face, researching a topic or issue, contacting outside parties such as providers and insurance companies with the client's permission, and assisting with claims filings;
- work with the County and/or Volunteer Coordinator in performing SHIIP outreach activities, such as health fairs and speaking engagements; and
- complete SHIIP Activity Report forms each time you participate in an counseling session or outreach event.

SHIIP Volunteer Counselors are trained to be the go-to person for seniors and Medicare beneficiaries in their local communities. As a volunteer, you would be responsible for providing balanced, unbiased

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ADDRESS SERVICE REQUESTED

SHIIP Volunteers (From page 11)

and accurate information to those who seek SHIIP’s help. SHIIP Volunteers and staff never recommend or promote one product over another, nor do they degrade any products or policies. They simply offer the client guidance and information with which he or she can make an informed decision.

SHIIP prides itself on offering excellent services to Medicare beneficiaries, senior citizens and families across North Carolina, and they couldn’t do it without their wonderful group of volunteers. They are truly some of the best in the nation.

If you are interested in becoming a SHIIP volunteer, contact Kevin Robertson at 1-800-443-9354, or visit SHIIP’s Web site, www.ncshiip.com.

Important Phone Numbers to Remember

NCRGEA	1-800-356-1190
MetLife Dental	1-888-466-9073
NC Retirement System	1-877-733-4191
CIGNA (Medicare Administrator)	1-800-633-4227
Seniors’ Health Insurance Information Program .	1-800-443-9354
Medical Review of North Carolina	1-800-722-0468
NC State Health Plan	1-919-881-2300
Blue Cross/Blue Shield	1-888-234-2416
(State Health Plan Administrator)	
Social Security Administration	1-800-772-1213
State Employees’ Credit Union	1-888-732-8562
Local Government Federal Credit Union	1-888-732-8562