

# Living **power**

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

## An Historic Challenge for the State Retirement System

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### Introduction

The Teachers' and State Employees' Retirement System (TSERS) faces a major challenge in this session of the General Assembly. The state's actuary has reported that TSERS will require an additional state employer contribution of \$181 million in 2010-11 to restore the long-term financial stability of the state pension plan.

The actuary also reported that the Local Governmental Employees' Retirement System (LGERS) would require an increase in the local government employer contribution rate in 2010. This increased contribution for LGERS was approved by the Board of Trustees for the Retirement Systems in January and will become effective July 1, 2010. The decision about the increased contributions for the Teachers' and State Employees' System rests with the General Assembly.

### Background of the Issue

The most recent actuarial audit of the Teachers' and State Employees' Retirement System covers the 2008 calendar

year and reflects the impact of the recession on the system. The report shows that the market value of TSERS assets declined by nearly \$16 billion. On an actuarial basis, these losses are recognized over a five-year period.

It should be noted that TSERS and the other state administered retirement systems still are in very good financial condition. The systems have more than enough resources to meet the pension obligations owed to current retirees. The concerns about the funding of TSERS are longer term. It is clear that even with a return to a more normal pattern of growth in the financial markets, investment returns alone will not restore full funding to the system. The system will require an increased employer contribution.

Each year, the actuary estimates the amount needed in annual contributions that, together with projected investment returns, will be required to keep the retirement system fully funded. This is called the Annual Required Contribution (ARC).

*(Continued on page 3)*



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## News & Views: Are you receiving our weekly legislative updates?

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While the North Carolina General Assembly is in session, one benefit of membership that we offer our members is the ability to receive weekly legislative updates detailing the happenings of the prior week. The summary is written every Friday morning to keep our members informed. You have two options in receiving the weekly report. If you have internet access, you may go to our website at [www.ncrgea.com](http://www.ncrgea.com) to sign up. We do not share our email addresses with anyone.

Or, if you don't have a computer, just call our office anytime night or day at 919-834-4652 or 1-800-356-1190 to listen to our recorded legislative hotline. If it is after hours or on weekends, our automated phone service will prompt you with easy directions of how to listen to the summary.

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## Want to be a Lifetime Member of NCRGEA?

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Ever wish that you could pay your annual dues just once and be done with it? You can! Lifetime dues are available for our members. Over 2,180 of our members have chosen the lifetime option. Lifetime members receive the same benefits as

those who pay regular, yearly dues.

Check the age range on the chart and send us a check or money order for that amount. In a few weeks, we will mail you a laminated lifetime membership card.

Age	Amount
50 - 54	\$250
55 - 59	225
60 - 64	200
65 - 69	175
70 - 74	140
75 - 79	110
80 - 84	75
85 - 89	45
90+ member	Free

If you decide to become a lifetime member, just write "Lifetime Membership" in the memo section of the check. If you have paid your dues in the last two months and would like to get a lifetime membership, you may deduct the amount you've already sent from your range and send a second check. You may also select the lifetime dues option if you are on pension deduction. We will discontinue your pension deduction if you have a lifetime membership.

**One Note:** The lifetime dues chart has not been updated since 1991. The NCR-GEA Board of Directors is slated to vote in June on increasing the dues amount on the above chart. If you are considering the Lifetime Dues option, these prices are good through June 30, 2010 so send us your check today or go to our website, [www.ncrgea.com](http://www.ncrgea.com) and pay online.

*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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## Historic Challenge

*(Continued from page 1)*

Last year, the General Assembly anticipated the need to increase the state's employer contribution rate for TSERS to meet the Annual Required Contribution (ARC) and included roughly half of the projected amount that would be needed for 2010-11 in the state's biennial budget. The remaining amount that should be funded this year is \$181 million. The North Carolina General Assembly has an unbroken 69-year history of funding the Teachers' and State Employees' Retirement System at or above the ARC.

Of course, this year the General Assembly must make further adjustments in the second year of the state's biennial budget to reflect the fact that state revenue collections are below projections. Initial responses from some legislators suggest that finding the money to fund the ARC will be very difficult.

However, the funding requirement set by the actuary is more than just an abstract and technical benchmark to measure proper funding of TSERS. Failure to fund the full Annual Required Contribution this year will have consequences not only for the retirement system but also for every state retiree.

Historically, the Teachers' and State Employees' Retirement System has been able to pay Cost-Of-Living Adjustments to retirees from funds generated by undistributed gains in the pension system. TSERS will not generate such gains in the future if the system is not funded at the levels set

by the actuary, the Annual Required Contribution. The staff of the Retirement Systems Division also has put forth several other reasons why the full funding of the system is a matter of top priority. These are presented below.

**1. The \$181 million Repays A Small Fraction of Losses.** Even this increase is restoring only a tiny fraction of the 2008 investment losses. The losses totaled \$16 billion and this increase is only \$181 million.

**2. Delay is Painful.** Ultimately the State must honor its obligation to its employees. If we delay meeting this obligation, it becomes much more difficult. If we wait until FY2012 to get back on track, the needed increase is projected to be \$645 million. If we wait until FY2013, it is \$1.32 billion. If we wait until FY2020, it is almost \$10 billion.

**3. The State Has Contributed More in the Past.** In the 1980s and 90s, the State contributed between 7% and just over 10% of pay. These contributions were sufficient to pay for new benefits being earned (about 6% of pay) and pay off unfunded liability. At 4.93%, the rate currently set for 2010-11, we would not even be paying the cost of new benefits earned during the year, much less paying off the liability.

**4. Amount is Small Relative to Peers.** Our neighboring states have re-

cently been contributing 7% to 13% of pay. Large private sector employers in the U.S. contribute an average of 7% of pay for retirement. Even with the full \$181 million, the State would still be contributing less than 7%, which is still less than our neighboring states. Georgia contributes 10.39% of payroll to the state employees' pension fund, Virginia's contribution stands at 7%, South Carolina's at 9.24%, and Tennessee provides a 10.39% contribution.

### Our Job

It is important that members of the General Assembly hear from retired state employees and teachers in every legislative district. Our legislators need to understand that it is in the long-term interest of the state to keep TSERS fully funded even though it will require difficult budgetary choices to do so. Our members should take every opportunity to let state legislators know in polite and concise terms that this is our top priority. *- Ed Regan*

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## Grass Roots Advocacy: How to Reach Your Legislators

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Large membership organizations like the N.C. Retired Governmental Employees' Association have the potential to influence the outcome of important legislative decisions through contact with members of the General Assembly from government retirees across the state. We are fortunate to have nearly 55,000 members who live in every corner of North

Carolina. There are NCRGEA members living in every legislative district.

This gives our Association a real opportunity to employ what is frequently called "grass roots" lobbying. Legislators are likely to give greater attention to issues that have an impact on people who they know and who live in their legislative districts. Effective "grass roots" lobbying involves making legislators aware of the fact that even issues that appear to be highly complex and abstract when viewed at the state level actually have important consequences in the daily lives of their constituents back home.

For our members who do not have access to Internet communications, the telephone is the most effective means of contact with legislators when the General Assembly is in session. We have included the current list of office telephone numbers for all of our State Senators and Representatives in this issue of the newsletter.

Members of the General Assembly also can be contacted by e-mail. All legislators have office e-mail addresses that are listed on their web pages as well pages 6 - 8 of this newsletter. You can access the web pages of every legislator through the General Assembly web site ([www.ncleg.net](http://www.ncleg.net)). You can pull up the web page of any Senator or Representative by going to either the Senate or House tabs across the top of the General Assembly web site.

For example, clicking on the House tab pulls up the House home page that has a link to the House Member List. Once you have accessed the List, you can pull up information on any Representative by

clicking on their name. This brings you to the legislator's individual web page. These web pages contain all contact information for General Assembly members, including the e-mail address.

## A Few Good Ground Rules

Regardless of the method of communication you use to contact members of the General Assembly, there are a few ground rules we would ask you to observe.

1.) Know your subject. Make sure you have all the background information you need in the event that the legislators you contact ask questions or request more information.

2.) Communicate effectively. Whether you call by telephone or send written communications, be accurate, brief and direct. Legislators usually are dealing with a variety of major issues and need to have information given in concise form.

3.) Timing is very important in the legislative process. Contact your legislators before bills of interest are considered in committee. Every year, a significant number of bills that have been introduced never emerge from committee.

4.) ALWAYS BE POLITE. Please remember, while legislators may not be able to support our position on an issue today, we may need their help on another issue in the near future. We do not gain anything if we alienate our potential friends in the General Assembly.

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## Butner Chapter Meeting Scheduled

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Association members in Durham, Franklin, Granville, Nash, Orange, Person, Vance and Warren counties are invited to attend the semiannual meeting of the Butner chapter on Tuesday, July 13 at 1:00 p.m. The meeting will take place at the Murdoch Chapel at the Murdoch Center Campus on "C" Street in Butner.

NCRGEA Executive Director Ed Regan will discuss the current 2010 legislative session. Our guest speaker has not yet been announced as of press time.

The Butner chapter meets twice a year and the meeting is open to all retired state and local government employees in the counties listed above. Refreshments will be served.

Directions: I-85, Exit 191. West on NC Highway 56. Proceed approximately one-half mile. Turn right on "C" Street. Murdoch Chapel is on the right hand side of the road.

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## Have you moved recently?

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Remember if you have moved recently, we need your correct address to be able to mail you our newsletter and other information. Call us at 1-800-356-1190 or email [kathy@ncrgea.com](mailto:kathy@ncrgea.com) to send us your current information. You will also need to notify the North Carolina Retirement System (even if you get your retirement check direct deposited) at 919-733-4191 or 877-733-4191 or via email [ncretirement@nctreasurer.com](mailto:ncretirement@nctreasurer.com).

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## Signing Off

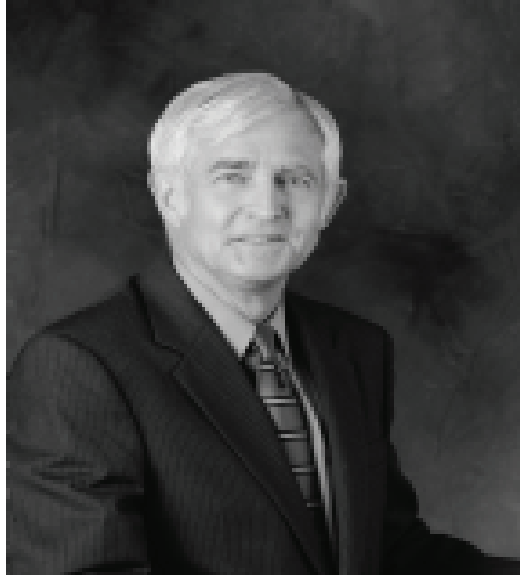
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- *Willis P. Whichard, NCRGEA President*

On Labor Day weekend 1997, I announced that I would not seek re-election to the North Carolina Supreme Court the following year. Like most of you when you retired, I was fully vested in the retirement system. I would essentially have been paying to work had I sought and served another eight-year term on the Court. It was an agonizing decision, but only because service on the Supreme Court is no ordinary job. Ultimately I concluded that after three decades of seeking and holding public office, I owed it to my family to do something else.

Soon thereafter I encountered Leigh Hammond, the Executive Director of the N.C. Retired Governmental Employees Association, whom I had known since his time in Governor Robert Scott's administration in the early 1970s. "We'll want to get you on our board when you retire," he said. I largely forgot the remark at the time, but Leigh was serious; in 2000 I was elected to the NCRGEA board of directors representing District Four. Now, after a decade of service, I will be term-limited off the board following the annual meeting on June 22nd.

I have enjoyed both the work and the relationships developed from it. The Association is functioning well, not because I have been the President, but because it has an able and dedicated staff, and an equally capable and committed cadre of volunteer leaders.



Nancy McCormac is the Nominating Committee's choice to succeed me as President. She has been splendid to work with over the past several years. She will do an excellent job, as will the other officers your board will elect in June.

One independent contractor with whom we work closely deserves mention and thanks. Jack Cozort is our lobbyist with the General Assembly. Working with Ed Regan, our Executive Director, he protects our interests when the legislature meets. I have observed his work for many years, and he is well worth what we pay him.

At some point in my tenure as President, the staff requested that I write a column for each issue of the Association's newsletter. While this has required work, it has been a joy. I have received considerable feedback, largely positive, from these columns; and as a byproduct I have heard from people from my past with whom I had lost contact.

*(Continued on page 12)*

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## Maintaining Coverage for Currently Enrolled Dependents

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### *Between the Ages of 19 and 26, Regardless of Student Status*

A resolution was passed by the Committee on Employee Hospital and Medical Benefits (Legislative Oversight Committee) on May 5, 2010 to draft legislation that would allow all currently enrolled State Health Plan dependents to remain on the Plan if they are under age 26, regardless of their student status. It is currently legislated that dependents between the ages 19 and 26 must be full-time students to be enrolled in the Plan.

If passed, this legislation would no longer require dependents between the ages of 19 and 26 to be removed from coverage if they are not full-time students.

The State Health Plan is advising members who want to continue coverage for their dependent children graduating from college this May, and who will lose eligibility on June 1, to *not* terminate their coverage. If a dependent's coverage is terminated, they will not be allowed to enroll their dependents in the Plan until the Federal mandate under Health Care Reform goes into effect for the Plan on July 1, 2011.

If the state legislation does not pass and an employee/retiree has kept their graduating dependent on their coverage, the dependent will be termed retroactive to June 1, 2010 and offered COBRA coverage,

with a June 1 effective date. Dependents will have 60 days from June 1, 2010 to elect COBRA. Any claims incurred after June 1 will be the responsibility of the dependent, if COBRA coverage is not elected.

Additionally, the premium will be reimbursed to employees/retirees if a tier coverage change is made when the dependent is removed (i.e. the difference in cost between employee-child coverage and employee-only coverage).

Dependent children between the ages of 19 and 26 who are not currently enrolled and who are not full-time students must wait to enroll in the State Health Plan until the Federal mandate under Health Care Reform goes into effect for the Plan (July 1, 2011). At that time, the Plan will provide coverage of all dependents up to age 26, regardless of student status.

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## Summer Hours

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The Association's office would like to remind you of our upcoming summer schedule. Beginning on Friday, June 4, our office will be open on Monday - Thursday from 7:30 a.m. to 5:00 p.m. and on Fridays from 7:30 a.m. to noon.

We will be closed on May 31, 2010 for Memorial Day, on Monday, July 5 for the Independence Day holiday, and on Monday, September 6 for Labor Day.

If you happen to call after hours or on a holiday or weekend, please leave a message and we will get back to you promptly. Enjoy your summer!

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## Volunteers Continue to be Essential for SHIIP's Operation

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Did you know that North Carolina has more than 1.3 million Medicare beneficiaries? And all those beneficiaries are served by 779 volunteers and coordinators from the Seniors' Health Insurance Information Program. That's almost 1,700 beneficiaries for every volunteer. Housed within the North Carolina Department of Insurance, SHIIP was established in 1986 to help educate Medicare beneficiaries about Medicare, Medicare supplements, long-term care insurance, Medicare Advantage, Medicare Part D prescription drug plans and other health insurance options for people with Medicare.

SHIIP operates a call center that has professionally trained staff to help provide unbiased information to Medicare beneficiaries with questions. SHIIP's volunteer base of 120 county coordinators and 659 volunteers assist Medicare beneficiaries in all 100 counties. Volunteers for SHIIP must successfully complete a computerized training course to become certified to better help people with Medicare. SHIIP volunteers are required to attend quarterly follow-up training, and they must provide

40 hours of counseling services annually to maintain their certification. Without our remarkable volunteers SHIIP could not reach out to all the people with Medicare in our state.

SHIIP volunteers are required to submit reports on each client they assist, and according to our records, they have helped nearly 60,000 Medicare beneficiaries in one-on-one counseling sessions during the past year. This is an outstanding accomplishment. SHIIP is very grateful for all



our volunteers, and we can never thank them enough for all that they do to assist people with Medicare. Each April National Volunteer Week is a great time to publicly thank all the SHIIP volunteers in

North Carolina for the remarkable service they provide.

SHIIP is always looking for new volunteers. Would you like to give back to your community? Do you have computer skills? Are you a people person? Do you have the ability to easily explain things to others? If you answered yes to any of these questions, you may be a great addition to the SHIIP family of volunteers. How can you become a SHIIP volunteer? Call our office today at 1-800-443-9354 or contact the SHIIP coordinating site in your county. Let us educate you about Medicare so you can help the citizens of this great state.



## Signing Off

*(Continued from page 9)*

I thank all of you for your support for our Association. Thanks, too, for allowing me this decade on the board and these two years as your President. The experience has enriched my life, and I hope that from time to time, perhaps when you did not even know it, my service has enriched yours.

Give Nancy McCormac your friendship and support as you have given them to me. With her as our leader, and with the continued efforts of the board and the staff, the Association, and all of us, are in good hands.

## Important Phone Numbers to Remember

NCRGEA .....	1-800-356-1190
MetLife Dental .....	1-888-466-9073
Superior Vision .....	1-800-507-3800
NC Retirement System .....	1-877-733-4191
CIGNA (Medicare Administrator) .....	1-800-633-4227
Seniors' Health Insurance Information Program ..	1-800-443-9354
NC State Health Plan .....	1-919-881-2300
Blue Cross/Blue Shield .....	1-888-234-2416 (State Health Plan Administrator)
Medco (SHP Prescription Drug Administrator) ...	1-800-336-5933
Social Security Administration .....	1-800-772-1213
State Employees' Credit Union .....	1-888-732-8562