

Teacher Recruitment, Recovery, and Retention Task Force

February 22, 2022

1:00 p.m. to 3:30 p.m.

Iowa Room, 1-153

1201 N. Third St. Baton Rouge, LA 70802

CALL TO ORDER

Commissioner Dr. Kim Hunter Reed called the meeting of the Teacher Recruitment, Recovery, and Retention Task Force to order at 1:01 p.m.

Before the roll was called, Dr. Reed welcomed the newest member of the Task Force, Ms. Joy Rimmer, a first-grade special education teacher at Port Allen Elementary who will serve as the representative for the Louisiana Federation of Teachers.

She also welcomed Mr. Patrick Steck, who serves as the Senior Director for Policy at Deans for Impact and expressed gratitude on behalf of the Task Force for his support in this work, part of the Board’s engagement of Deans for Impact to provide national best practices at upcoming Task Force meetings.

ROLL CALL AND INTRODUCTIONS

Ms. Mellynn Baker called the roll, and a quorum was established.

Members Present	Affiliation
Esrom Pitre	Senate Committee on Education
Em LeBlanc-Cooper	LDOE
Kim Hunter Reed	Commissioner of Higher Education
Karen Peace	LA Association of School Executives
Mike Faulk	LA Association of School Superintendents
Bruce Chaffin	LA State Association of School Personnel Administrators
Paula Calderon	LA Association of Colleges for Teacher Education
Cynthia Posey (designee)	LA Federation of Teachers
Valencia Johnson (designee)	LA Association of Educators
Barry Erwin	Council for a Better Louisiana
Sen. J. Rogers Pope	LA Senate
Rep. Buddy Mincey	LA House of Representatives
Sandy Holloway	BESE
Joy Rimmer	Association of Professional Educators of LA
Alex Jarrell	LA Association of Public Charter Schools

Members Absent	Affiliation
Rep. Mark Wright	House Committee on Education
Janet Pope	LA School Boards Association
Esrom Pitre	Senate Committee on Education

After the roll was called, Commissioner Reed recognized Representative Mincey, who addressed the Task Force, thanking them for their work over the past year. He also spoke about HB 75 as it reflects the importance of the Task Force and its work. He noted the importance of the upcoming legislative session and how it will affect Louisiana's teachers. Dr. Reed advised the Task Force to look at not only HB 75 but at all the upcoming legislation of relevance to our work.

APPROVAL OF NOVEMBER 16, 2021 MINUTES

Mr. Barry Erwin asked for a motion to approve the minutes of the November 16, 2021 meeting. On motion of Mr. Mike Faulk, seconded by Commissioner Kim Hunter Reed, the Task Force approved the minutes.

STATEWIDE VACANCY & EDUCATOR PREPARATION PROGRAM SURVEY

Commissioner Reed provided data regarding the educator pipeline. She noted that LDOE sent a survey in order to understand where Louisiana's teaching vacancies are located; simultaneously, Regents staff sent a survey to all educator preparation programs in order to better understand our current educator pipeline, since strengthening and expanding this pipeline is critical. This data will help to target solutions to immediate and long-term staffing challenges.

Commissioner Reed introduced Ms. Em LeBlanc-Cooper, Deputy Assistant Superintendent of Educator Development at the Department of Education, to present these data to the Task Force. Ms. Cooper began by providing the Task Force information regarding the number of teacher vacancies in Louisiana, noting the difficulties caused lack of data but reminding the Task Force that in order to respond to the challenge of recruitment and retention, the scale of need must be understood. To do this, a survey was sent in December to identify staffing vacancies, with 74% of the schools in the state responding.

A Task Force member interjected that due to the survey being sent out in December, the count is likely to be low as most vacancies occur in the spring. Ms. Cooper agreed and advised that the data have changed since survey administration, but that the survey included several components for each school within every school system, asking for total positions and vacant positions that were certified classified, and by full-time and part-time. The survey also collected information on the degree of difficulty in filling those vacancies and the strategies being used to hire. She encouraged everyone to look at the data without making initial assumptions about it. She wanted the Task Force to look at the data as different cuts, based on what was considered most

interesting to the Task Force. She advised that there are numerous factors as to why there could be higher or lower vacancies according to the data characteristics, since the total number of sites varies based on the characteristics. She also reminded the members that this is the first time the data have been collected, so there are no other data to compare.

Ms. Cooper then presented the data. As reported in the survey, there are 1,854 certified, and 1,129 classified vacancies in Louisiana. This accounts for 4% of total certified positions and 6% of total classified positions. Certified positions are those that require certifications, such as a principal or teacher, and classified positions are those that do not require certification, such as a secretary or paraprofessional. It was found that lower-performing schools and charter schools have higher vacancy rates than traditional systems; bus driver and teacher positions are the most difficult to fill. A Task Force member asked whether the data captures if a position was filled during an interim until a certified teacher or whether that interim position is counted as filled. Ms. Cooper responded that HR directors were instructed not to count interims as teachers in the position. For example, a long-term substitute is still considered a vacancy. The Task Force Member then asked Mr. Faulk how vacancies in December compared to the end of the year. Mr. Faulk responded that there is a significant increase in vacancies at the end of the year as the school systems ask for notices of intent to be submitted by the end of April so they can plan for staffing for the coming year. Sometimes they are able to fill vacancies with midterm graduates, but they do not begin until after the Christmas holidays. Vacancies for bus drivers, however, are astronomical. The Task Force Member then asked Mr. Faulk whether, since teachers do not disclose they are leaving until April, the number of vacancies would be higher in April. Mr. Faulk replied that they would.

Ms. Cooper continued to present the data. The first section of the survey asked the HR directors to provide the total number of certified classified positions at each site, along with the vacancies in those positions. Rates and averages were calculated for these vacancies. Certified vacancies at schools with a D or F letter grade and those labeled Comprehensive Intervention Required (CIR) were higher. Classified vacancy rates were higher than certified vacancies. The average school system vacancies for classified and certified positions were highest in the largest school systems. Ms. Cooper advised that it is important to think about that denominator as the numbers change as it is connected to how many total positions and how many schools exist. A Task Force member asked why this particular set of data was chosen. Ms. Cooper responded a few different data characteristics were chosen based on people's interest. She then presented a graph of reported vacancy rates by different characteristics and context to interpret. The survey reported that certified vacancy rates for middle schools are one percentage point higher than elementary and high schools and combination schools have the highest vacancy rates and are one percentage point higher than middle schools. Classified rates are higher across all school types. Certified vacancies for CIR schools are five percentage points higher than non-CIR schools and certified and classified vacancy rates for charter schools are four percentage points higher than public schools/traditional systems. Ms. Cooper then presented a second graph that displayed the same characteristics as the previous graph showed average vacancies at school sites, with an average of 1.8 certified and 1.1 classified vacancies at each. The average number of certified and classified vacancies is highest in our combination schools. The average number of vacancies at charter schools for both classified and certified is about double that of traditional. Looking at the data by school letter grade and CIR status, sites with a D or F letter grade and labeled CIR have higher average vacant positions. The smallest school systems have a higher rate of vacancies as

there are fewer positions, so a vacancy has a bigger impact in a system with a smaller number of schools. In terms of grouping systems by rural and urban, rural systems have higher certified vacancy rates while urban systems have higher classified vacancy rates. Finally, looking at the data through the lens of the school system's letter grade, systems labeled as F have a 12% vacancy rate in certified positions and D and F systems have a 7% vacancy rate for classified positions.

There was then a discussion of these findings. Commissioner Reed asked for percentages of rural versus urban systems and Ms. Cooper offered to pull that information. A Task Force member asked how certified teachers teaching outside their area of certification are counted. Ms. Cooper responded that if a teacher is in a position, regardless of certification, the position is not counted as a vacancy. A Task Force Member asked whether quarantining and COVID were taken into account in vacancy counts. Ms. Cooper responded that a brief absence due to COVID did not count as a vacancy since there was still a certified teacher employed in that position. Mr. Faulk responded that this would affect the absentee rate.

A Task Force Member noted that, looking at vacancies in New Orleans, the socioeconomic status of the children enrolled in a school was the biggest indicator of high vacancies and asked, if staffing is one of the biggest costs of school systems, are there creative ways in which school systems are using unspent funds? Are schools waiting to hire in those positions, or could they reallocate funds unspent due to vacancies to provide bonuses for current teachers? Ms. Cooper responded that more systems are thinking about stipends for teachers. Several systems have started doing this a year ago, and the pressure of other systems taking this approach has helped start systems thinking about how they can use funds on hand for retention purposes. Another Task Force Member asked how staff could be supported as they would not receive a teacher stipend.

Ms. Leblanc-Cooper noted that school systems have an average of 18.2 certified and 11.1 classified vacancies per system with 40 or more sites. The average number of vacancies is higher in smaller systems. Urban systems have a higher average of vacancies compared to rural. Systems rated A, B, and C have higher average vacancies than D and F systems, but A, B, and C school systems also have more sites there.

The next section of the survey showed that part-time vacancies were higher than full-time, though with fewer part-time positions across the state than full-time. The rates for non-classroom teachers, classified staff and bus drivers were similar regardless of full- or part-time status. Ms. Cooper then discussed the degree of difficulty to fill each position type. Of the responses, 60% said that school leader positions were easy to fill, 65% said bus driver positions were very difficult to fill, and 53% said classroom teacher positions were very difficult to fill.

The last section of the survey addressed strategies used to cover vacancies. The most common strategies used were asking current employees to take on additional responsibilities, long-term subs, and posting job positions on social media. The least common strategies were expanding benefits and including performance measures in the hiring process.

Ms. Cooper outlined the next steps following this survey. The data will be presented to BESE in March. The data will help to drive decisions and strategy around other recommendations and it is necessary to build a data system that can consistently collect this information.

Mr. Faulk asked how much information can be gleaned from the exit interviews conducted by districts. Ms. Leblanc-Cooper responded that an annual report is done on those surveys, but the information is vague, exit surveys are not required and often not returned, and employees value their privacy and do not want to reveal anything that could be used against them should they return to that district. A Task Force Member commented that only four exit surveys were received from the many resignations and retirements in their department over the year and that there are no incentives for them to complete the survey.

A Task Force Member asked for Ms. Cooper's thoughts on the surveys that were not returned. She replied that of the systems that did not return the surveys, the majority of the 25% of sites not reporting were charter schools and as many were single-site charters, noting that the system leader is also the principal, which may be a challenge. A Task Force Member voiced concerns about the timing of the survey and was surprised by a 61% response rate given the short timeframe. Ms. Cooper noted that the submission deadline was extended to the end of January.

A Task Force Member asked that staff advise BESE of the timing of the survey, since it does not provide a good indicator of the full problem and does not show the urgency. A discussion of timing then followed. A Task Force Member suggested that the information should live in a data system that is live and in real time, to ensure a survey like this does not have to be done again. A Task Force Member commented that perhaps timing the survey towards the end of the year and the beginning of the next would provide the most significant picture of what is happening and will be more realistic. Dr. Susannah Craig commented that a live database that is updated monthly, or quarterly, would be a good way to get the real-time information that is needed.

Dr. Craig then transitioned to the educator preparation program survey and provided an overview. She advised that the department reached out to the state's Colleges of Education, both public and private, to get information on anticipated graduates and the numbers were concerning. She presented data on the numbers of completers who have been certified from the last four years (2019-2022), with the 2022 numbers representing anticipated completers. From 2019 to 2022, there has been a decline in the number of completers, from 470 to 254 in alternative programs and 912 to 784 in traditional baccalaureate programs. She advised that these numbers do not include teachers in alternate certification programs, as the data is only from Colleges of Education. Within the data, she pointed out that elementary education has the largest number of completers each year, but still shows a decline. For middle school, there is a decline from 2019, but an increase between 2021 and 2022, which represents an increase in the number of anticipated graduates in English Language Arts (ELA), not in high-need areas such as Math, Science and Special Education. A Task Force Member asked if that was still true even with changes that were made to the math certification requirements. Dr. Craig replied that this was correct. A Task Force Member added context to the discussion, noting that not all of the universities have a grades 4-8 program, and secondary (grades 6-12) majors who are having trouble with the high school Praxis exam are begin advised to enter the grades 4-8 program,

explaining the increase in that number. Once these students have gained experience and knowledge, they will take the Praxis so they can teach through 12th grade.

Dr. Craig provided the data for anticipated high school completers. There are still larger numbers graduating in ELA and fewer entering math and science fields. There has been a small uptick from 2021-2022 in the traditional program, but a steady decline in the alternate programs. In 2022, there are only 36 anticipated completers in a math or science teacher preparation program in a college of education. A Task Force Member commented that students can make more money being a math major and content-area faculty are advising students of this. A Task Force Member commented that about half of students polled at the College of Education at LSU, when asked to specify their major, declared elementary, with the rest middle and high school; of the middle and high school majors, none was in math or science.

Dr. Craig then presented on Special Education. The drop from 2019 to 2022 is 178 to 143, so a decrease of about 35 total teachers in Special Education, which is a high-need area. There was a jump from 58 to 116 in one year, but that may be attributed to one institution changing its degree program from a regular, separate program to an integrated or merged one, so students were earning their special education at the same time they were earning their content area. A Task Force Member commented that this program has been integrated for some time, that Special Education is considered best practice for all students, and that all students should get dually certified.

UPDATES TO THE 2021 PRELIMINARY RECOMMENDATIONS (LDOE & BoR)

Dr. Craig introduced Mr. Patrick Steck, Deans for Impact and Ms. Cooper to present on the impact of Praxis Core on educator preparation enrollment.

Ms. Cooper reminded the Task Force that one of the approved recommendations was to study the impact of Praxis exams on the educator preparation program enrollment. This presentation will provide the Task Force with some of the barriers and data around Praxis Core and provide a concrete recommendation to address the impact.

Ms. Cooper advised that one barrier to entering a teacher preparation program is entrance requirements. In response, the LDOE and Board of Regents are proposing to endorse a policy change that would replace the Praxis Core requirement with language referencing the standardized aptitude tests that universities use for admission. This would go into effect for the next school year. Currently, BESE policy requires candidates to meet a certain GPA for undergraduate or an alternate pathway, along with passing the Praxis Core, or having a minimum ACT or SAT score to enter the preparation program. Louisiana law requires a standardized aptitude test, and BESE policy has added the barrier by putting an additional requirement for

entry into the program beyond the legal requirement. A Task Force Member added that the deans are supportive of this policy change.

A Task Force Member asked for clarification of how BESE's policy exceeds the law. Ms. Cooper explained that the law states that candidates have to pass a standardized aptitude test and the BESE policy states that, besides the ACT, this could include the Praxis Core. Dr. Craig added that the ACT minimum required score of 22 is often higher than the score required to enter an institution.

Mr. Steck noted that the completion rates presented by Dr. Craig and Ms. Cooper can give a glimpse into staffing challenges that districts will face in the next academic year. The gap between completers and vacancies is just short of 200, but that is not accounting for who else may leave. He hopes that the Task Force recognizes that though the data show short-term challenges, which solving the Praxis Core barrier may not address, it is important to think about solving longer-term challenges for those who could be kept out of the system.

Mr. Steck then presented national and state enrollment figures. There has been a steady decline over the past ten years, with a small uptick between 2016 and 2018. Since 2018, though, teachers in particular have suffered the impacts of working on the front lines of the pandemic, but there is not up-to-date data as the federal government reports are about two years behind. He then presented Title II data from the Department of Education, which showed that between 2016 and 2018 the state followed a similar trajectory and trend as the national data, with a very small increase in enrollment in teacher preparation programs. Given the context of the pandemic, however, a down trend in enrollment numbers is expected. A survey conducted by the National Association of Colleges of Teacher Education found that approximately 19% of undergraduate programs and 11% of graduate or post-baccalaureate programs across the country are experiencing declining enrollment. While the study does not include the data for Louisiana, national trends provide some insights.

Mr. Steck then discussed how Praxis Core and other standardized tests can be a barrier for those wanting to enroll in teacher preparation programs and what the research shows about good quality assurance control measures and ineffective barriers to teaching. Currently 14 states require basic skills testing and six other states list several options for testing basic skills; all of the states include Praxis Core as an option to test basic skills. Since 2015, many states have scaled back entry requirements and put a greater focus on the quality assurance measures used during and at the completion of an education preparation program. These types of policy shifts that reduce barriers at entry are putting a greater trust on higher education partners to undertake the work to make sure that students are prepared to be effective teachers. Of the 11 states that have scaled back, eight have dropped the test entirely, with the most recent being Alabama. Other states, like Missouri, have shifted the requirement to program completion, still requiring an

additional test, and two states, North Carolina and Texas, have kept it optional by adding other measures and proxies.

Mrs. Cooper joined the presentation to discuss what she and Mr. Steck think are the four main barriers around the current policy. So as students already have to meet entrance requirements to be admitted, with ACT already being a basic skills test, adding this layer is just an unnecessary gate prior to getting into a program. Other programs, such as engineering or biology, do not require an assessment at the beginning of a program, but it is also not a predictor of success as an educator. Potential candidates who do not meet this additional requirement, meaning they do not pass the Praxis or make the higher ACT score, either move into another field of study or delay their entrance into the program, then delaying graduation and wasting money and time. A Task Force Member commented that adult career changers or currently uncertified teachers seeking teacher certification tend to be so far from geometry, high school English, etc., that when they come back for alternate certification, they cannot get into a program.

Mr. Steck also pointed out that Praxis One is not a useful indicator of potential future effectiveness as a teacher. In a study from 2007 by Dan Goldhaber, it was found that the exam tends to screen out many more future effective teachers than screens out future ineffective teachers and low scores are only an indicator of first-time test takers. Since 2007, about 15 different research studies in different contexts have validated the findings. He also pointed out that in alternative spaces where there are proponents for the use of basic skills requirements, there is a shift away from Praxis Core into other types of examinations, typically developed by states, which take tremendous amounts of resources to develop and ensure that they are not creating disparate impacts based on the test taker.

Ms. Cooper then presented the second barrier of passing the Praxis Core. More than half of aspiring educators, about 1,000 aspiring educators each year, are unable to pass the assessment and unable to enroll into a teacher prep program.

Ms. Cooper addressed the third barrier: access. Asking a college student to incur an additional cost of \$150 for Praxis for each test taken, along with the other costs they and their families have, is significant. The costs can discourage aspiring educators from even pursuing the profession. In addition, ACT is cheaper than Praxis because the state pays for all of its high school juniors to take that test. In addition, scheduling multiple tests is time-consuming and access to a testing center (or in-home setup for options to take the assessment at home) can be challenging.

Mr. Steck presented the last barrier: national and state efforts to diversify the workforce, given the growing body of research around the importance of having a teacher in the classroom who reflects the students they serve. A 2017 research study found that exposure to a Black teacher in

primary school cut high school dropout rates for Black male students by 39%. When looking at Praxis Core specifically, 2011 research conducted by ETS found that a massive 40-point gap between African American test takers and their white peers. Even considering GPA, household income, parents, educational attainment, and several other variables, the gap remains at least seven points. In taking a closer look at the data, including enrollment in the teacher preparation program and the selectivity of the institutions, there was little to no impact. More recent data, from 2019, found a 34-point gap between white and Black test takers.

Ms. Cooper revisited how this barrier is adding to the teacher shortage. She advised that though this is not an emergency decision, the issue has been discussed for some time and the barrier has existed for decades. The Task Force's work has magnified the need to make the change now.

Dr. Craig added that College of Education deans have discussed for years the need for a change in the Praxis Core requirement. She noted that Colleges of Engineering, Nursing, Biology, and Math use requirements to grant admittance to the university. Education is the only program with this extra step. A Task Force Member commented that both public and private universities have national accreditation requirements and have measures in place, including dispositional assessments and other steps throughout, using the aspiring teacher rubric through NIET and monitoring upon entry and through, until it is time to counsel out.

Ms. Leblanc-Cooper stated that LDOE and BOR are proposing revisions to the BESE policy that would adjust the entrance requirements from requiring the Praxis Core or the higher ACT score, to using aptitude tests that the university uses for admission. This will not prohibit campuses from adopting additional metrics if they choose but removes the policy as a barrier. The law stipulates that there must be an assessment to enter the program and that LDOE has the authority to decide that assessment. As the universities are already using ACT or SAT upon admission, the law indicates that the same assessment can be used if the BESE policy decides that is what can be used. So, we are going to seek changes to the BESE policy, including Bulletin 996, and are asking for an endorsement from the Task Force to move forward with this proposal.

There was then a discussion on the policy. A Task Force Member commented that this action addresses one of the Rs in the Task Force's charge: recruitment. The data show that the number of students in the Schools of Education are dwindling. Another Task Force Member commented that it also addresses retention, as there are uncertified teachers and paraprofessionals who want to be certified teachers and who have the ability and aptitude to be certified teachers. A Task Force Member asked how this change impacts program providers who are not university-based. Commissioner Reed replied that the BESE bulletin update would be for all.

Mr. Alex Jarrell discussed how the policy would affect the prestige of teaching, indicating that communication of this change matters and the rationale provided here does not come across as dumbing down the profession but getting rid of a damaging barrier.

Rep. Mincey asked Ms. Sandy Holloway how long the policy change would take and if legislation will be needed as backup. Ms. Holloway replied that BESE should know by March 8th. A Task Force Member commented that after the Letter of Intent, there is a period of 90 days for public input. Rep. Mincey asked whether, if BESE does not make the change, legislation would be needed. Commissioner Reed suggested that Rep. Mincey could put in a placeholder instrument. Ms. Cooper stated that her intent was for the change to go to BESE in April, if it receives an endorsement today; if passed in April, it could go into effect in April. Ms. Cooper commented that BESE does know about the recommendations and that this work is moving, whether it impacts the policy or not.

In the interest of time, Commissioner Reed recommend that the Task Force affirm the recommendation and that research can be done on the law. She also put an exclamation point on Mr. Jarrell's point on removing a barrier versus lowering standards. Mr. Steck commented that there is additional support around the communications component as other states have recently taken this up and have been effective in demonstrating it as a barrier.

Mr. Barry Erwin asked for a motion to endorse the proposal to adjust entrance requirements to a teacher preparation program from requiring Praxis Core to substitute the standardized aptitude test used by each university's admission criteria (e.g., ACT, SAT). On motion of Ms. Sandy Holloway, seconded by Mr. Mike Faulk, the Task Force endorsed the proposal.

2022 LEGISLATIVE SESSION UPDATES

Commissioner Reed introduced Katherine Whitney from the Teachers' Retirement System of Louisiana to discuss the upcoming legislative bills related to the work of the Task Force and Ms. Cooper to share what LDOE is doing legislatively,

Ms. Cooper started by discussing teacher pay raises. A \$1,500 increase for teacher salaries has been proposed by the Governor and BESE would send over the MFP in a few weeks. The MFP Task Force met and discussed this along with proposing a \$2,000 mentor teacher stipend. The MFP resolution, when it goes to the legislature, can only be approved, denied, or sent back to BESE, so the legislature cannot make any amendments to the bill. She also indicated that LDOE and BESE have been working together on potential legislation. Mr. Faulk commented that the MFP Task Force recommended that, should additional revenues be recognized by the legislature,

teacher and support worker pay raises would be increased. Ms. Holloway commented that BESE is currently not sponsoring any bills but would be hearing the bills that LDOE is considering.

Ms. Whitney reported that there are currently no bills that will impact TRSL's plan in terms of making changes; however, as it is a Regular Session, it is possible that there may be some additional bills. She then discussed the bills regarding return to work and identified the three stakeholders: retirees who want the flexibility to go back to work, employers who have needs to fill positions with experienced educators, and a retirement system that will always be focused on ensuring that changes make little to no impact and have no significant cost which ultimately trickles down to the employer contribution. She then discussed the actual cost between current law and proposed law. There is an incentive that will change retirement patterns. The retirement system is designed to cover employees who work their careers and then stop. So, a component that allows them to retire earlier than they otherwise would but then return to work creates a cost. Louisiana return-to-work law only affects cases of returning to a TSO-eligible position. There is no prohibition to hiring retirees, but only an understanding of how their benefits would be impacted.

She then presented the 2021 return-to-work data, pointing out a downward trend in the number of retirees returning to work due in large part to changes in the return-to-work law and working longer. The largest one-year decline was 28% between 2020 and 2021. A large portion of that decrease was in what is called the "grandfather" group, which was the group from 2010 that could return back to work with no restrictions. Their average age is 72, so that group is diminishing.

Ms. Whitney then moved onto discussing the bills. She began by putting them into context. With the changes in 2020 to the return-to-work law, there are essentially two groups of retirees returning to work: the 2010 group who retired on or before June 30th, 2010 and did not return to work before July 1st, 2020; and the 2020 group, who returned for the first time after July 1st, 2020. The three bills this session focus on the 2020 group. If you are in 2010 group, you may be in this group if you are identified as a retired teacher, retired before June 30th, 2010, but also if you fill one of three types of positions: a grandfather group, a critical shortage, and there is an option to receive 25% of your retirement benefit if you fall into a number of categories. The 2020 group has two options: earning 25% of your final average compensation with retirement benefits suspended as long as you continue that employment after earning the 25%; or suspend the benefit and choosing a supplemental benefit upon return to work. When employment is terminates, the retiree can start receiving the benefit again.

A Task Force Member asked what determines the supplemental benefit. Ms. Whitney replied that it is based upon the time the employee works when they return. If they return for three years, they get a supplemental benefit on those three years and the formula includes their final

average compensation during that period of time. The Task Force Member followed up by asking if they can receive the full salary of being employed as well as the supplemental. Ms. Whitney responded that when they go back and choose option two, they suspend their retirement benefit, so are employed like a regular employee teacher and start contributing again.

Ms. Whitney then reviewed the three legislative bills. House Bill 22 proposes to increase the earnings limit for the 2020 group from 25% to 50%. This bill is very limited as it only applies to individuals who retired and returned to work as of December 31, 2021. It has a sunset provision as well, of July 1, 2025, which is probably a measure to reduce any cost impact. Commissioner Reed asked for the dollar amount or average if you are going from 25% to 50%. Ms. Whitney replied that, based on a final average compensation of \$40,000, a person would go from earning \$10,000 to \$20,000 per year. Commissioner Reed then asked Mr. Bruce Chaffin who this will help at that level of earning. Mr. Chaffin responded that there are many positions, including sabbatical positions, that a retiree could fill at 50%. A Task Force Member also commented that a retiree could come in also only teach a limited number of classes and not be considered a full-time employee. Mr. Chaffin advised that there is one-year waiting period. Ms. Whitney noted that in the two bills that raise the limit to 50%, there is nothing that changes the waiting period. A Task Force Member asked if this affects hiring university supervisors to conduct recruitment. Mr. Chaffin responded that he does not know the advantage or disadvantage of the waiting period remaining. Ms. Whitney replied that, from a cost perspective, there is a federal tax provision that requires some type of waiting period, which will come into play with one of these bills. In addition, the waiting period hedges against the cost piece because it is a deterrent to someone if they would have to suspend benefits for a year if they return. Dr. Craig asked for clarification of the suspension of benefits if going up to 50%. Ms. Whitney replied that, under option one for the 2020 group, an employee can go back and earn up to 25%. It is only after you exceed the 25% that the retirement benefit would start to suspend. Commissioner Reed clarified that this is for a group that has already retired and is not incentivizing people to retire.

Ms. Whitney then presented the next bill, which is similar but with no real limitations on participation or a sunset. House Bill 26 will increase the 2020 group option 2 from 25% to 50% with no restrictions on who it will apply to as long as you are in the 2020 group.

Ms. Whitney stated that the third bill would be a concern from a cost perspective as it is broad repeal of the law implemented for the 2010 group and creation of a new framework. It would leave the 2020 group in place, repeal the 2010 group, create a new return-to-work group that would allow K-12 retirees to return to work with no waiting period, no suspension of benefits, and no contributions to TRSL. Mr. Chaffin commented that this approach would create a huge jump in retirees. He also stated that they are beginning to see a downward trend in what an employer has to pay to TRSL in retirement rates, which needs to continue.

A Task Force Member asked what limitations the critical shortage definition has on school systems. Ms. Whitney replied that there is a specific process that must be followed. A school system requires advertisement in their official journal as well as in the higher education institutions within a 120-mile radius. If they get fewer than three qualified candidates certified in the subject area, they are able to declare a critical shortage and hire the retiree. Once the retiree is in that category, they pay contributions, and once they ultimately terminate, they can get a refund of those contributions with no suspension of their benefit. The Task Force Member asked if there are limitations on where a critical shortage can be declared. Ms. Whitney explained that it has to be in a specific subject area.

A Task Force Member commented that sending a position to a college recruitment center within 120 miles makes no sense because to fill that position the person has to be certified in the field. Commissioner Reed commented the critical shortage process and definition could be completely revamped and made easier. A Task Force Member agreed that it is a cumbersome process and that he would like to see the university portion eliminated and the advertisement period reduced.

A Task Force Member commented that school systems are dealing with critical shortages right now. Some of the things that the Task Force is doing are good for the long term, but some issues must be addressed immediately. Some pieces of legislation are detrimental to the retirement system, but he is trying to find a solution that helps school systems right now. Commissioner Reed asked if the critical shortage process is in the law. Ms. Whitney replied that it was, and they were simply implementing the law. She noted that these bills are largely neutral with a few problematic pieces, and that stakeholders should recognize the bigger picture.

A Task Force Member commented that when these laws were written no one did onboarding for systems as they do now. Most systems can now post a job to a board-approved site that reaches the whole country with the click of a button, eliminating the need to post it twice in a journal. A Task Force Member commented that not everyone has broadband and there should still be some sort of publication. A Task Force Member asked if there was any opposition to looking at the 120-mile radius rule. Ms. Whitney replied that all of the groups who have an interest in this probably should look at the three bills and that TRSL will not take a position if the legislature decides to change that process. A Task Force Member asked if it would be reasonable to consider a change to the critical shortage process, to enhance the opportunity for school systems across the state to fill immediate needs. Ms. Whitney replied that this would probably be a good argument.

Commissioner Reed recommended that Mr. Chaffin along with the HR directors, superintendents and others look at the law and make recommendations, so Rep. Mincey has information from a collective review. A Task Force Member commented that the superintendents have established a legislative action committee that can review this. A Task Force Member asked Rep. Mincey

what the time frame would be. He replied March 4th is the prefiling deadline. Ms. Whitney advised the Task Force that any retirement bills have to be advertised. There was then discussion that current bills could be amended.

A Task Force Member asked about two of the bills requiring that the person must already be retired, which minimizes any type of incentive. If that requirement was eliminated so that it goes from 25% to 50% for anyone, would this have significant impact on incentives for people to retire early and cost the system more? Ms. Whitney replied that it would have some cost but not as significant as House Bill 26. The 50% will probably provide less incentive to retire, but more than the 25%.

Commissioner Reed thanked Ms. Whitney for her informative presentation.

TASK FORCE NEXT STEPS

Commissioner Reed reviewed a handout that shows the status of Task Force work on each item and asked that members be aware of ongoing efforts.

Commissioner Reed advised that the next meeting of the Task Force is on April 11, 2022, at 1 p.m.

PUBLIC COMMENTS

There were no public comments.

ADJOURNMENT

There being no further discussion, and the Task Force voted unanimously to adjourn the meeting.

ADDITIONAL ATTENDEES & GUESTS

Name	Affiliation
Mellynn Baker	Board of Regents
Dr. Susannah Craig	Board of Regents
Dr. Michelle DeMeulenaere	Board of Regents
Melissa Anders	Board of Regents
Hannah Courtney	Board of Regents

Melissa Cloutet	Board of Regents
Cara Landry	Board of Regents
Patrick Steck	Deans for Impact
Katherine Whitney	TRSL
Lisa Honore	TRSL