



HOUSE RESOLUTION 143 TASK FORCE MEETING
Wednesday, July 30, 2025
Claiborne Building, Suite 6-200
10:00 a.m. – 12:00 p.m.

Task Force Members Present	Affiliation
Eddie Meche	University of Louisiana System (ULS)
Ashley Jackson	University of Louisiana System (ULS)
Dr. Bryan Fuller	University of Louisiana System (ULS)
Dr. Jeannine O'Rourke	University of Louisiana System (ULS)
Tommy Smith	Louisiana State University System (LSU)
Haley "Niki" Norton	Louisiana State University System (LSU)
Dr. Jane Cassidy	Louisiana State University System (LSU)
Desiree Honore Thomas	Southern University System (SUS)
Dawn M. Harris	Southern University System (SUS)
Dr. Ghirmay S. Ghebreyesus	Southern University System (SUS)
Dr. Cynthia Bryant	Southern University System (SUS)
Gena Doucet	Louisiana Community and Technical Colleges System (LCTCS)
Dr. Mark McLean	Louisiana Community and Technical Colleges System (LCTCS)
Beth Alford	Louisiana Community and Technical Colleges System (LCTCS)
Kenneth "Kenny" Herbold	Louisiana Legislative Auditor
Dr. Samuel Gladden	Board of Regents
Kenneth "Trey" Roche	Teacher's Retirement System of Louisiana
Task Force Members Absent	Affiliation
Dr. Wendi Palermo	Louisiana Community and Technical Colleges System (LCTCS)
Dr. Daniel "Dan" Tirone	Louisiana State University System (LSU)
Heath Williams	Office of Group Benefits
Staff Members Present	Affiliation
Elizabeth Bentley-Smith	Board of Regents

CALL TO ORDER/ROLL CALL

Ms. Elizabeth Bentley-Smith called the meeting to order at 10:07 a.m. Roll was taken, and quorum was established.

INTRODUCTIONS

Ms. Bentley-Smith asked attendees to introduce themselves to become familiar with the group. She clarified that she is facilitating the task force but does not have a voting role.

REVIEW OF LEGISLATION

Ms. Bentley-Smith reviewed the legislative foundation and purpose of the current task force. She noted that members have copies of the relevant legislation and the final report from the **HR 169** task force.

She provided an overview of **HR 169**, which provided for a study of the relationship between ORP (Optional Retirement Plan) and TRSL (Teachers' Retirement System of Louisiana), with a focus on recruiting and retaining faculty and staff in Louisiana. That task force made 10 recommendations, and Ms. Bentley-Smith expressed appreciation to **Representative Bacala** for leading enactment of these suggestions, noting that all but two of the recommendations were incorporated into legislation.

The two recommendations not included were:

1. Increasing the ORP employer contribution rate from 6.2% to 8%, now under review by this task force.
2. Addressing **phased retirement** and its potential impact on public postsecondary institutions.

She emphasized the task force's current charge:

- **Evaluating phased retirement programs**, particularly their potential to preserve institutional knowledge.
- **Re-examining ORP and TRSL defined benefit and defined contribution plans.**

The task force's **final report and recommendations are due to the House Committee on Retirement by December 31, 2025.**

TASK FORCE RESPONSIBILITIES

Ms. Bentley-Smith outlined the task force's responsibilities, divided into ten components:

- The **first six** focus on **phased retirement programs**, including the involvement of the **Office of Group Benefits (OGB)** due to the health insurance implications.
- The **last four** examine **retirement income options for ORP members.**

Key points discussed:

- **Louisiana currently has the lowest ORP contribution rate** in the southern region.
- Increasing the contribution rate would have a significant fiscal impact — approximately **\$10 million annually** across all four higher education systems and BOR.
- Any recommendation made without corresponding legislative funding would require institutions to absorb the costs.

Item #9 involves shifting the TRSL administrative fee from ORP members to the employer, creating an additional financial obligation.

- **Trey Roche** noted that half of the administrative fee is scheduled to shift to the employer in **FY 2027**.
- **Tommy Smith** inquired about financial support from the defined benefit plan; Mr. Roche clarified that ORP funding comes solely from employer contributions and explained fund usage.

Item #10 concerns allowing **accrued leave** to enhance participant benefits, similar to provisions for **LASERS** members.

ELECTION OF TASK FORCE CHAIR

Ms. Bentley-Smith asked for nominations. No nominations were made from the floor. Ms. Bentley-Smith nominated Dr. McLean to serve as task force chair, and Dr. McLean accepted. Kenny Herbold seconded the nomination.

OVERVIEW OF PHASED RETIREMENT

Ms. Bentley-Smith provided an overview of phased retirement programs, noting:

- Such programs primarily serve faculty, allowing them to gradually transition from full-time work to retirement.
- While programs vary by institution, all require a **contractual agreement**.
- Institutions including **Loyola University New Orleans** will present their phased retirement models at the **August meeting**.

Benefits of phased retirement:

- Reduced workload
- Flexible scheduling
- Opportunities for mentorship and knowledge transfer

Challenges include:

- Varied administration across systems
- Legal and policy complexities

NEXT STEPS

Ms. Bentley-Smith stated that she will provide the presentation as well as other reports to the task force members. She also reminded members of future meeting dates and the final report deadline.

FUTURE MEETING DATES

- Wednesday, August 27, 2025
- Wednesday, September 17, 2025
- Wednesday, October 15, 2025
- Wednesday, November 12, 2025

DISCUSSION

Dr. McLean asked members for input on forming sub-committees. Ms. Bentley-Smith supported sharing responsibilities but cautioned that all components are interconnected through human resources and financial considerations.

Gena Doucet noted that hearing diverse perspectives was valuable in the previous task force.

Tommy Smith raised concerns about current funding constraints and the task force's ability to recommend cost-incurring changes. **Dr. McLean** requested that the **status of the UAL (Unfunded Accrued Liability)** be presented at the August meeting.

Niki Norton posed several questions for future discussion:

- Can DROP be used concurrently with phased retirement?
- Will phased retirement be open to **faculty and staff**?
- Will it be open to **TRSL, ORP, and LASERS** members?
- What is the **health insurance vesting impact**?
- Will leave payouts be calculated at full-time or part-time rates?
- How will phased retirement affect **return-to-work policies**?
- Can participants **elect to continue retirement contributions at 100%**?

Ms. Bentley-Smith and **Ms. Doucet** acknowledged that some program elements may need to be **system-specific**, based on management board decisions and institutional needs.

Dr. McLean asked about the origin of the 8% ORP contribution recommendation. Ms. Bentley-Smith explained that the HR 169 task force wanted to propose a modest increase, referencing **Appendix E** of their report, which reviewed employer contribution rates in the SEC ranging from **15–17%**. **Bryan Fuller** added that this figure reflects employer contribution matches. Ms. Bentley-Smith reminded members that this work is framed around **recruitment and retention strategies**.

Dr. McLean asked why the 8% proposal was not included in the final legislation. Ms. Bentley-Smith stated it was due to **funding limitations** and Representative Bacala's desire to avoid delaying other legislation, though he remained supportive.

Trey Roche commented that phased retirement could result in cost savings, but that financial modeling is needed to determine its true impact. Dr. McLean inquired about the extent of financial modeling available. Ms. Bentley-Smith noted that the HR 169 task force only discussed the concept, and did not address the financial modeling.

Niki Norton pointed out that phased retirement may require institutions to **double-encumber** positions and offer higher salaries to new employees. She and Dr. McLean discussed the importance of understanding how many employees will be retirement-eligible in the next 5–10 years. Ms. Bentley-Smith confirmed that this data would need to be collected from the systems.

Dr. Ghebreyesus asked whether phased retirement includes **staff**. Ms. Bentley-Smith and Dr. McLean confirmed that staff can be included and that the legislation does not exclude them. However, the approach may differ from faculty.

Dr. Ghebreyesus also raised concerns about **tenured faculty and instructors**, and how eligibility decisions will be made. Ms. Bentley-Smith noted this would likely vary by institution. She concluded by reminding members she would share all related materials following the meeting.

ADJOURNMENT

Ms. Bentley-Smith requested a motion to adjourn the meeting. On motion of Tommy Smith, seconded by Beth Alford, the meeting was adjourned at 11:12 a.m.