

HOUSE RESOLUTION 143 TASK FORCE MEETING

November 12, 2025

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Louisiana Board of Regents

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I. Call to Order



II. Roll Call



III. Approval of Minutes



IV. Presentation of Return-to-Work Recommendations

Katherine Whitney, TRSL Executive Director



RETURN-TO-WORK (RTW)

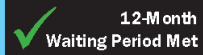
Senate Study Request 1 of 2025 - Study Work Group

Proposed Recommendations

Current RTW Laws

2010 RTW LAW: Retired before July 1, 2020

Retired Teacher:



12-Month
Waiting Period Met

- **Grandfathered Retiree**
- **Advanced Speech Degree Retiree**
- **Critical Shortage Positions:**
 - » **Full-time/Part-time positions:** Certified PreK-12 classroom teachers in subject area of critical shortage
 - » **Full-time/Part-time positions:** Certified speech therapists, speech pathologists, audiologists, educational diagnosticians, school social workers, school counselors, school psychologists, interpreters, educational transliterators, or educators of the deaf or hard of hearing
- **Earnings Limit Positions (25% of annual benefit):**
 - » Substitute PreK-12 classroom teachers, adult education or literacy instructors, adjunct professors (as defined in La. R.S. 11:710), school nurses (as defined in La. R.S. 17:28), presenters of professional development training, tutors for any PreK-12 student, classroom teachers employed in a temporary capacity to proctor tests

Provisions sunset July 1, 2027:



12-Month
Waiting Period Met

- **Core Subjects:**
 - » Certified in math, English language arts, science, or special education (excluding gifted/talented)
- **Special Leave:**
 - » Certified, at least age 62 with at least 30 years of service to fill vacancy for maternity, military, sabbatical, or extended sick leave

Retired Member

(does not meet Retired Teacher criteria)

Benefit
Suspended

Contract & Corporate Contract Employment

(subject to Retired Teacher/Member criteria)



12-Month
Waiting Period Met

2020 RTW LAW: Retired on/after July 1, 2020

Option 1: Earnings Limit (25% of FAC):

- » Any full-time or part-time position

12-Month
Waiting Period

Option 2: Regain Active Membership & Earn Supplemental Benefit

- » Any full-time position

Benefit
Suspended

Option 3: Critical Shortage Positions

- » **Full-time/Part-time positions:** Certified PreK-12 classroom teachers in subject area of critical shortage
- » **Full-time/Part-time positions:** Certified speech therapists, speech pathologists, audiologists, educational diagnosticians, school social workers, school counselors, school psychologists, interpreters, educational transliterators, or educators of the deaf or hard of hearing

12-Month
Waiting Period

Contract & Corporate Contract Employment

Benefit
Suspended

CURRENT PROVISIONS TO RETAIN

12-MONTH WAITING PERIOD: Serves as anti-selection protection

- **Criteria:** All retirees must fulfill a 12-month waiting period after retirement to receive a benefit if reemployed in a TRSL-eligible position. Reemployment before lapse of waiting period will result in suspension of benefit.

GRANDFATHERED GROUP: Maintain status quo for this retiree group

- **Criteria:** All retirees who retired on / before June 30, 2010, can RTW with no impact to benefit.

SUSPEND BENEFIT / EARN SUPPLEMENTAL BENEFIT: Identical to 2020 RTW Law – Option 2

- **Criteria:** Upon reemployment in a full-time position, retirees can opt to suspend benefit during reemployment and regain active membership in TRSL to earn supplemental benefit.

NOTE: Advanced speech degree group in current law to be captured by new provisions.

RTW PROPOSALS OF INTEREST

EARNINGS LIMIT: Standardize and increase earnings limit to 50% of FAC

- **Criteria:** All retirees (regardless of retirement date) can RTW under earnings limit equal to 50% of final average compensation (FAC).
- **Requirement:** Fulfill 12-month waiting period
- **Other:** Includes contract/corporate contract reemployment

RTW PROPOSALS OF INTEREST

AGE 65: Implement age-based provision with no impact to benefit

- **Criteria:** All retirees (regardless of retirement date) can RTW with no impact to benefit upon reaching age 65.
- **Requirement:**
 - » Be at least age 65
 - » Fulfill 12-month waiting period
- **Other:** Includes contract/corporate contract reemployment

RTW PROPOSALS OF INTEREST

CRITICAL SHORTAGE: Simplify critical shortage process and include adult education with no impact to benefit

- **Criteria:** All retirees (regardless of retirement date) reemployed under critical shortage provisions can RTW with no impact to benefit.
- **Requirement:**
 - » Must be reemployed in FT / PT positions (PreK-12 and adult education) that require a valid teaching / ancillary certificate, as listed in current law
 - » Need not be certified in the subject area of the critical shortage position to be filled
 - » Fulfill 12-month waiting period
- **Employer Processes:**
 - » **Declaration/advertisement requirement:** Website only
 - » **Applicant pool:** Retain fewer than 3 non-retiree applicant requirement - who must be certified in subject area
 - » **FT / PT certification requirement:** Retiree certification in any subject allowed; certification of critical shortage completed through EMIS enrollment rather than form submission; eliminate requirement to report critical shortage to BESE

Current Law: Critical Shortage FT / PT Positions

- PreK-12 “classroom teacher”
- Speech therapist
- Speech pathologist
- Audiologist
- Educational diagnostician
- School social worker
- School counselor
- School psychologist
- Interpreter
- Educational transliterator
- Educator for the deaf or hard of hearing

RTW PROPOSALS OF INTEREST

CONTRACT / CORPORATE CONTRACT: Retain, but refine C/CC provision

For K-12: The TRSL RTW Law applies to employment by contract or corporate contract when the contracted services could be performed by an employee of a public school district in a position which falls under one of the following Profile of Educational Personnel (PEP) categories:

- **Instructional programs:** Include regular and special education across all age and grade levels (K-12, pre-kindergarten/Head Start/early childhood, adult/continuing education), as well as vocational and other instructional programs (i.e.: bilingual/ESL, driver's education, ROTC, etc.).
- **Pupil Support Services:** Include child welfare and attendance, guidance, and health services as well as pupil assessment and appraisal services.
- **Instructional Staff Services:** Include curriculum development services as well as parish-wide directors/supervisors/coordinators of instructional programs, media-based instructional staff, respective clerical/secretarial staff and related educational media or instructional staff positions. *NOTE: Staff Training Services (professional education) is excluded from this list.*
- **School Administration:** Includes school principals, assistant principals, respective clerical/secretarial staff, and related administrator positions.
- **Food Services Operations:** Includes school food service supervisors and assistant supervisors, cafeteria managers and assistant managers, lunch room workers, aides, respective clerical/secretarial staff, and related regular food services personnel.

RTW PROPOSALS OF INTEREST

CONTRACT / CORPORATE CONTRACT: Retain, but refine C/CC provision

For postsecondary institutions: Reemployment through a contract or corporate contract is subject to RTW laws when the retiree is reemployed as professor, adjunct professor, instructor, or researcher.

SUMMARY

- ❖ **Eliminate** 2010 / 2020 RTW Law distinction
- ❖ **Retain** grandfathered group (retired on / before June 30, 2010)
- ❖ **Retain** 12-month waiting period
- ❖ **Retain** suspend benefit to regain active membership and earn supplemental benefit
- ❖ **Increase** earnings limit to 50% of FAC
- ❖ **Add** age 65 provision (no impact to benefit at age 65 and older)
- ❖ **Simplify** critical shortage process and include adult education
- ❖ **Retain, but refine** contract and corporate contract provision

NEXT STEPS

- | | |
|----------------------|--|
| Mid-November | Study group receives draft report and finalizes |
| Late November | Submit report to legislature |
| January 1 | Ad #1 deadline for retirement bills (1st day introduction) |
| January 7 | Ad #2 deadline for retirement bills (1st day introduction) |
| January 20 | Request for retirement legislation deadline |
| January 23 | Pre-file deadline for retirement bills |
| March 9 | Session starts |

V. Phased Retirement Plan Option Recommendations

Discussion



Recommendation

Each system shall develop a Phased Retirement policy, dependent upon their system needs. The systems shall determine and define those needs as related to their institutions. Enrollment in the program shall be entirely voluntary.



Potential eligibility requirements of a phased retirement program

Recommendation

Each policy shall include the following:

- Definition of enrollee → full-time faculty and unclassified staff member (the latter at the discretion of the system)
- Length of enrollment shall be no shorter than 12 months and no longer than 36 months
- Persons enrolled must have a minimum of ten years of collective service (not necessarily consecutive), without refund of retirement contributions
 - Age of enrollee shall be no less than 59 ½ years
- MOU between the institution/system and the enrollee, inclusive of the enrolled employee's workload and schedule expectations
 - The system shall determine who "signs off" on the MOU, but shall include, at least, an HR officer, an academic officer, and a fiscal officer.
 - The workload shall be a minimum of 50% effort
 - Dual employment is prohibited during phased retirement enrollment. Formal acknowledgment is to required
- Faculty may be rehired at full or part time, but only following a defined period of time after the end of the phased enrollment



Time-period for implementation of potential phased retirement program

Recommendation

- The Phased Retirement policy must be approved by the systems' management board no later than June 30, 2027, to allow for the phased retirement program to go into effect no earlier than July 1, 2027.



Salary and retirement benefits to be received during phased retirement

Recommendation

- Enrolled participants shall receive a portion of their retirement benefits based on the system's defined percent of effort (effort defined as not less than 50%).
- Enrolled participants shall retain full-time employment status in order to maintain health insurance.
- Enrolled participants' salaries shall remain static during their time in the program.
- Once enrolled, participants shall not accrue leave.



Potential of providing additional lifetime income

Recommendation

- Enrolled participants may receive a percentage of their contribution to annuity consistent with reduction of workload percentage.
- Contributions made to the participants' DB retirement plan shall continue upon enrollment but be prorated based on workload adjustment.
- Enrolled participants may continue to contribute to their supplemental retirement plans.



VI. ORP Contribution Rate and Accrued Leave Enhancements Recommendations

Discussion



Impact of increasing employer rate from 6.2% to 8%

- **Recommendation 1:** To ensure equitable and competitive retirement benefits for Louisiana's public employees, it is strongly recommended that each public higher education system establish a minimum employer contribution rate equal to the employee's required contribution of 8%. This adjustment would not only align Louisiana with best practices in retirement funding but also enhance the state's ability to attract and retain top talent in a highly competitive job market. An equal employer contribution rate reflects a commitment to investing in employees' futures and provides a more sustainable path toward financial security in retirement.
- **Recommendation 2:** The Constitutional amendment passed as Act 222 of the 2025 Regular Session, to be voted on in May 2026 [as per Act 1 of the 2025 First Extraordinary Session] by the state populous, seeks to liquidate various trust funds and use the proceeds to make payments to TRSL's unfunded accrued liability (UAL), thus creating savings for employers.
 - It is recommended that the establishment of requiring an increase to 8%, subsequently by the systems be contingent on retaining a minimum of \$13M from the recognized savings [of the \$81M currently estimated] in the higher education budget thereby allowing these savings be used by institutions to increase employer contributions to ORP accounts, making Louisiana more competitive among Southern states.
 - Shall this contingency be met, it is recommended that a subsequent action of amending Louisiana Revised Statute 11:927 be made to establish a required minimum employer contribution rate equal to the employee's required contribution of 8%.



Shifting payment of TRSL admin fee from ORP members to employer

Recommendation

- Shifting the total ORP administrative fee cost to employers shall be contingent on legislative funding.
 - Shall this contingency not be met, the total ORP administrative fee cost will remain split between the employee and employer, with the employee cost not increasing past 50% of the total administrative cost.



Potential cost of providing greater pay out by using accrued leave to enhance a participant's benefit

Recommendation

- ORP participants shall be paid for up to 600 hours of accrued leave.
 - The current payout amount is 500 hours.



VII. Future Meeting Dates

Board of Regents Conference Room

- Discussion of December 2025 meeting, TBD

Next Meeting Discussion Items:

- Finalization of Task Force Recommendations



VIII. Other Business



IV. Adjournment



THANK YOU!

Special thanks to the Human Capital Management staff at the Louisiana Board of Regents

- **Karlita Anderson, Assistant Commissioner**
- **Kelly Cormier, Human Resources Business Partner**
- **Kim Small, Employee Relations Specialist**
- **Ashlyn Prejean, Student Intern**

