



Notice of Meetings

Louisiana Board of Regents

P.O. 3677 • Baton Rouge, LA 70821-3677

Phone: (225)-342-4253 • Fax: (225)-342-9318

www.laregents.edu

Tuesday, January 28, 2025

| Event | Time | Location |
|--|----------|-------------------------------|
| Board Development | 9:00 AM | Iowa Room |
| (Meeting as a Committee of the Whole)** | | |
| Board of Regents | | |
| Audit | | Louisiana Purchase Room 1-110 |
| Finance | 10:30 AM | Claiborne Building, 1st Floor |
| Facilities and Properties | | 1201 N. Third St. |
| Academic and Student Affairs | | Baton Rouge, LA 70802 |
| Planning, Research, and Performance | | |

ADA Accessibility Requests

If you have a disability and require a reasonable accommodation to fully participate in this meeting, please contact Karlita Anderson five (5) business days before the meeting date via email at Karlita.Anderson@laregents.edu or by telephone at (225) 219-7660 to discuss your accessibility needs.

INDIVIDUAL COMMITTEE AGENDAS MAY BE FOUND AT WWW.LAREGENTS.EDU.

* The meeting may begin later contingent upon adjournment of previous meeting. Meetings may also convene up to 30 minutes prior to the posted schedule to facilitate business.

** The Board of Regents reserves the right to enter into Executive Session, if needed, in accordance with R.S. 42:11 *et seq.*



Kim Hunter Reed, Ph.D.
Commissioner
of Higher Education

Misti S. Cordell
Chair
At-Large

David J. Aubrey
At-Large

Christian C. Creed
5th Congressional District

Blake R. David
3rd Congressional District

Stephanie A. Finley
3rd Congressional District

Phillip R. May Jr.
1st Congressional District

Darren G. Mire
2nd Congressional District

Kennedy M. Orr
Student Member

Wilbert D. Pryor
4th Congressional District

K. Samer Shamieh, M.D.
1st Congressional District

Terrie P. Sterling
At-Large

Collis B. Temple III
6th Congressional District

Judy A. Williams-Brown
4th Congressional District

Agenda

Board of Regents Meeting*

Meeting as a Committee of the Whole

Tuesday, January 28, 2025

10:30 AM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

- I. Call to Order
- II. Oaths of Office (2025 Officers and New Board Members)
- III. Roll Call
- IV. Ratification of Committee Assignments for 2025
- V. Public Comments
- VI. Approval of Minutes from December 11, 2024
- VII. Amendment to Bylaws
- VIII. Meauxmentum Moment
- IX. Reports and Recommendations of Standing Committees
 - A. Audit
 1. EisnerAmper Internal Audit Presentation
 - a. Internal Audit Status Update
 - i. LUMCON Vessel Day-Rates
 - b. FY25 Audit Plan Update for Approval

B. Finance

1. Five-Year Funding Formula Approval
2. HR 169 Task Force Report Approval

C. Facilities and Property

1. Consent Agenda
 - a. Small Capital Projects Report
 - i. LSU A&M: East Campus Apartments Boiler Replacements
 - ii. LSU A&M: Howe-Russell Suites W0151 and W0153 Renovations
 - iii. LSU A&M: Renewable Natural Resources Building Interior Painting
 - iv. LSU A&M: SVM Large Animal Hospital Floor Refinishing
 - v. LSU A&M: SVM Main Building Energy Efficiency Lighting Replacement
2. Additions to BOR FY 2025-26 Capital Outlay Budget

D. Academic and Student Affairs

1. Academic Programs
 - a. AAS Radiologic Technology – Fletcher Technical Community College
 - b. AAS Respiratory Care – SOWELA Technical Community College
 - c. AAS Patient Navigator – Northshore Technical Community College

- d. BA Digital Media Arts – Southern University and A&M College
2. New Research Center
 - a. NCI Designation Update and Approval of Center for Comparative Oncology – Louisiana State University A&M
3. Other Business

E. Planning, Research, and Performance

1. Consent Agenda
 - a. R.S. 17:1808 (Academic Licensure)
 - i. Initial Applications
 - a. Herzing University – Madison
 - b. Lake Erie College
2. Legislative Reports
 - a. House Concurrent Resolution No. 17
 - i. Teacher Recruitment, Recovery, and Retention

Task Force 2024 Annual Report

X. Chair's Comments

XI. Reports and Recommendations by the Commissioner of Higher Education

XII. Other Business

XIII. Adjournment

**Note: The Board of Regents reserves the right to enter into Executive Session, if needed, in accordance with R.S. 42:11 et seq.*



BOARD *of* REGENTS
STATE OF LOUISIANA

PROPOSED 2025 BOARD OF REGENTS COMMITTEES

As of January 22, 2025

Academic and Student Affairs*

(Standing Committee under R.S. 17:3399.5)

Terri P. Sterling, Chair
David Aubrey, Vice Chair
Christian C. Creed
Ted H. Glaser III
Darren G. Mire
Samer Shamieh
Kennedy Orr, *(Student Member)*
LCTC System Representative
LSU System Representative
SU System Representative
UL System Representative
Staff: Tristan Denley

Facilities & Property Committee*

(Standing Committee under R.S. 17:3399.5)

Phillip R. May, Jr., Chair
Collis Temple III, Vice Chair
David J. Aubrey
Ted H. Glaser III
Darren G. Mire
Christy Oliver Reeves
Terri P. Sterling
LCTC System Representative
LSU System Representative
SU System Representative
UL System Representative
Staff: Chris Herring

Audit Committee

(Standing Committee)

Judy Williams-Brown, Chair
Christian C. Creed, Vice Chair
Blake R. David
Stephanie A. Finley
Dallas L. Hixson
Samer Shamieh
Staff: Kim Hunter Reed

Finance Committee*

(Standing Committee under R.S. 17:3399.5)

Blake R. David, Chair
Darren G. Mire, Vice Chair
Christian C. Creed
Dallas L. Hixson
Collis Temple III
Judy Williams-Brown
LCTC System Representative
LSU System Representative
SU System Representative
UL System Representative
Staff: Elizabeth Bentley-Smith

Executive Committee for 2024

(Ad hoc Committee)

Misti Cordell, Chair
Terrie P. Sterling, Vice Chair
Phillip R. May, Jr., Secretary
Blake R. David
Christian Creed
Collis Temple III
Judy Williams-Brown
Staff: Kim Hunter Reed

*This committee is comprised of members from the management boards.

Legislative Committee*

(Standing Committee under R.S. 17:3399.5)

Collis Temple III, Chair
Phillip R. May, Jr., Vice Chair
David J. Aubrey
Stephanie A. Finley
Wilbert D. Pryor
Christy Oliver Reeves
Kennedy Orr, *(Student Member)*
LCTC System Representative
LSU System Representative
SU System Representative
UL System Representative
Staff: Brianna Golden

Personnel Committee

(Standing Committee)

Christian C. Creed, Chair
Terri P. Sterling, Vice Chair
Blake R. David
Stephanie A. Finley
Wilbert D. Pryor
Collis Temple III
Judy Williams-Brown
Staff: Elizabeth Bentley-Smith

Artificial Intelligence

(Special Committee)

David J. Aubrey, Chair
Phillip R. May, Jr., Vice Chair
Stephanie A. Finley
Samer Shamieh
Terri P. Sterling
Kennedy Orr, *(Student Member)*
Staff: Tristan Denley

Planning, Research & Performance

(Standing Committee)

Darren G. Mire, Chair
Judy Williams-Brown, Vice Chair
Blake R. David
Ted H. Glaser III
Dallas L. Hixson
Christy Oliver Reeves
Kennedy Orr, *(Student Member)*
Staff: Susannah Craig

Research and Sponsored Initiatives

(Standing Committee)

Stephanie A. Finley, Chair
Wilbert D. Pryor, Vice Chair
Ted H. Glaser III
Dallas L. Hixson
Phillip R. May, Jr.
Samer Shamieh
Staff: Carrie Robison

Statewide Programs

(Standing Committee)

Wilbert D. Pryor, Chair
Samer Shamieh, Vice Chair
Philip R. May, Jr.
Christy Oliver Reeves
Terri P. Sterling
Kennedy Orr, *(Student Member)*
Staff: Carrie Robison

DRAFT

BOARD OF REGENTS

December 11, 2024

The Board of Regents met at 1:00 p.m. on Wednesday, December 11, 2024, in the Thomas Jefferson Room A&B, Claiborne Building, 1201 N. Third Street, 1st Floor, Baton Rouge, Louisiana. Chair Misti Cordell called the meeting to order and welcomed Regent K. Samer Shamieh to his first meeting.

ROLL CALL

Ms. Doreen Brasseaux called the roll, and a quorum was established.

Present for the meeting were:

Kim Hunter Reed, Commissioner
Misti Cordell, Chair
Darren Mire, Secretary
David Aubrey
Christian Creed
Blake David
Stephanie Finley
Robert Levy
Phillip May
Kennedy Orr, Student Member
Wilbert Pryor
K. Samer Shamieh
Gary Solomon Jr.
Collis Temple III
Terrie Sterling
Judy Williams-Brown

Mgmt. Board Representative present were:

LSU System representative, Collis Temple, Jr.
UL System Representative Salter

Absent from the meeting was:

Felix Weill

PUBLIC COMMENTS

Chair Cordell asked if there were any public comments. There were none.

APPROVAL OF THE MINUTES OF THE JUNE 12, 2024 MEETING (Joint BESE/BOR)

On motion of Regent Temple, seconded by Regent Cordell, the Board voted unanimously to approve the minutes of the June 12, 2024 meeting.

APPROVAL OF THE MINUTES OF THE OCTOBER 23, 2024 MEETING

On motion of Regent Aubrey, seconded by Regent Mire, the Board voted unanimously to approve the minutes of the October 23, 2024 meeting.

AMENDMENTS TO BYLAWS

Chair Cordell presented updates to BoR Bylaws based on Act 491 of 2024, which allows the Governor to opt to appoint the chairs of various boards and commissions, including Regents. BoR Bylaws must be amended to conform with the 2024 law.

On motion of Regent Temple, seconded by Regent May, the Board voted unanimously to approve the updates to the BoR Bylaws.

Chair Cordell explained proposed changes in the language regarding Board procedures for the Nominating Committee's development of recommendations each December for members to serve on the Proprietary Schools Commission. If adopted, these changes would allow the Board to appoint members when a vacancy occurs, removing this as a regular function of the Nominating Committee.

Regent Solomon asked for clarification about language stating that the vice chair or secretary shall not succeed themselves more than twice in succession. Dr. Uma Subramanian, BoR General Counsel, explained that individuals may serve a maximum of two consecutive years in these roles.

On motion of Regent May, seconded by Regent Sterling, the Board voted unanimously to approve the changes in Board procedures for the Nominating Committee.

REPORTS AND RECOMMENDATIONS OF STANDING COMMITTEES

On motion of Regent Aubrey, seconded by Regent May, the Board voted unanimously to approve in globo the reports and recommendations of BoR Standing Committees.

CHAIR'S COMMENTS

Chair Misti Cordell made the following comments:

- She noted that her tenure on the Board has been a great learning experience. She has traveled to many parts of the state, including numerous trips to the Baton Rouge area, in her capacity as a Board member and Chair. She praised the BoR Staff for their dedication and hard work. Regent Temple congratulated Chair Cordell on her contributions.
- She asked Kennedy Orr, student member, to present her Student Board Member report. Regent Orr reported on a successful academic year. She indicated that the student government presidents across the state are excited about moving forward. She expressed appreciation for the work of the BoR. She looks forward to an upcoming trip to Washington, DC with the Council of Student Body Presidents in the spring.

- She mentioned attendance at the investiture of McNeese State President Dr. Wade Rousse and praised Dr. Rousse's commitment to McNeese and the Lake Charles area.
- She recognized five BoR members whose terms of service are ending. Earlier in the meeting Regent Pryor had thanked Regents Aubrey, Levy, Mire, Solomon, and Weill for their service on the Board. Regent Levy, the Board's longest-serving member, took a brief time to express his gratitude for the work of the Regents over his 24 years as a member.

LOUISIANA TUITION TRUST AUTHORITY (LATTA)

PUBLIC COMMENTS

Commissioner Reed asked if there were any public comments. There were none.

APPROVAL OF THE MINUTES OF THE MARCH 27, 2024 MEETING (Joint BESE/BOR)

On motion of Regent Creed, seconded by Regent Solomon, the Board voted unanimously to approve the minutes of the March 27, 2024 meeting.

CONSENT AGENDA

A. Approval of Final Rulemaking – Rulemaking to amend Section 315 of the START Saving Program rules to add the applicable interest rates for the Louisiana Principal Protection investment option and for Earnings Enhancements for the 2023 calendar year.

Robyn Lively, Senior Attorney for the Louisiana Office of Student Financial Assistance (LOSFA), explained that at its March 27, 2024, meeting, the Louisiana Tuition Trust Authority authorized publication of a Notice of Intent to add the interest rates to be applied to deposits in the START Saving Plan's principal protection option and to be applied for eligible Earnings Enhancements for the tax year ending December 31, 2023. The interest rates are determined by the State Treasurer and must be promulgated into the rules each year. The LOSFA Advisory Board recommended that the Louisiana Tuition Trust Authority authorize publication of the final rule.

On motion of Regent May, seconded by Regent Creed, LATTA approved the Consent Agenda items.

NOMINATING

Regent Solomon announced that the Nominating Committee had recommended the following officers for 2025: Vice Chair – Regent Terrie Sterling and Secretary – Phillip May, Jr.

On motion of Regent Levy, seconded by Regent Williams-Brown, the Board voted unanimously to approve the nomination of Regent Sterling as Vice Chair and Regent May as Secretary.

Regent Solomon announced the nomination of the following four non-officer members to serve on the Executive Committee for 2025: Christian Creed, Blake David, Collis Temple III, Judy Williams-Brown.

On motion of Regent Levy, seconded by Regent Aubrey, the Board voted unanimously to approve the nomination of Regents Creed, David, Temple, and Williams-Brown to serve on the Executive Committee for 2025.

FINANCE

REVIEW AND UPDATE OF FIVE-YEAR FUNDING FORMULA

Ms. Elizabeth Bentley-Smith, Interim Deputy Commissioner for Finance and Administration, provided a brief overview of the funding formula review process and work group actions. She noted that the Board of Regents is constitutionally [Art. 8, Sec. 5(D)(4)] and statutorily [R.S. 17:3129.2(B)] tasked with providing a fair and equitable distribution of funding for Louisiana's public institutions. Regents allocates State General Funds to the four postsecondary systems.

In early 2024, BOR, in partnership with all public higher education systems, initiated an agreed-upon five-year review of the state's higher education funding formula. Ms. Bentley-Smith stated that, as part of this process, Regents and the systems have worked jointly and collaboratively, using the current funding model as a starting point, to develop the next funding formula iteration. This represents the third time since the legislature enacted outcomes-based funding in 2014 and implemented it in Fiscal Year 2016–2017 that BOR and the systems have conducted a review.

Ms. Bentley-Smith noted that the workgroup was guided by certain principles: 1) the formula is aligned to the state's workforce needs, 2) the formula focuses on aiding all students, 3) the formula recognizes and rewards the different missions of our institutions, and 4) the formula is driven by clear and concise data.

The workgroup, including representation from all four systems and the Board of Regents, began meeting in March. Ms. Bentley-Smith noted that the proposed model was developed through a collaborative effort and reflects elements sought by each of the four systems, with an increased emphasis on education attainment in high-demand and high-reward disciplines. The model is workforce focused, provides continued fiscal stability, and includes the Meauxmentum Framework, further aligning with our Master Plan goals. Ms. Bentley-Smith also conveyed that the proposed model recognizes research as a stand-alone component along with validated skills and learning credentials at two-year institutions, responding to the interest for the model to be more workforce-aligned.

Ms. Bentley-Smith concluded by noting that Commissioner Reed and system presidents have had ongoing discussions regarding the formula recommendations. She indicated that this overview was for information only and that the proposed formula model will be considered by the Board at its January meeting. Following her presentation, Regent Aubrey asked whether online students and/or associate's degrees are counted in the funding formula. Ms. Bentley-Smith explained that students who take 100% of classes online and live out-of-state are not recognized in the funding formula, nor are associate's degrees awarded by four-year institutions. Commissioner Reed reiterated that Regents would retain the current practice of not recognizing those items.

Regent Sterling asked why four-year associate's degrees are not recognized. Commissioner Reed explained most associate's degree programs were moved to LCTCS when it was established, though some four-year colleges retained associate's degree programs. Those institutions that retained such degree programs were notified that these would not count in the funding formula.

Regent Aubrey requested clarification of the weights in the funding formula related to nursing graduate degrees, specifically the weights assigned to a Ph.D. in nursing and a DNP, or Doctor of Nursing Practice. Ms. Bentley-Smith responded that she would provide these details to the Board.

Regent Solomon inquired as to the weight of "outcomes" in the previous formula model. Ms. Bentley-Smith and Commissioner Reed clarified that the outcomes weight is 30% in the current model and 35% in the proposed model. Regent Solomon also asked: 1) How the transition from the present formula model to the proposed model will impact institutions that are reducing base costs to address their fiscal health; 2) how the data collected by the Blanco Center at the University of Louisiana at Lafayette is being used within the proposed model; and 3) whether dual enrollment is included in the proposed funding formula model. Ms. Bentley-Smith responded related to the first question that as the data included in the formula model is from the previous fiscal/academic year, any actions taken by an institution will be reflected in the following year's formula allocation. She noted that for those institutions that have had significant fiscal health concerns, the impact may be spread over multiple years. Related to question 2, Deputy Commissioner Tristan Denley noted that the data collection by the Blanco Center is not yet complete, so it is not yet a part of the proposed formula model. Ms. Bentley-Smith responded to question 3 that dual enrollment courses are captured within the new proposed funding formula model.

Ms. Bentley-Smith then provided an overview of the Third Extraordinary Session of the Louisiana Legislature, which ended Friday, November 22, 2024. She indicated that the impacts of the session are still being calculated by legislative staff and will not be fully known until the Revenue Estimating Conference meets and the constitutional amendment is voted on in March. She noted that it is anticipated that the UAL, which is a substantial cost to institutions, will be paid down, yielding savings across all systems. Regent Aubrey then asked for a campus-by-campus breakdown of the UAL savings, which Ms. Bentley-Smith indicated she would provide.

OTHER BUSINESS

Ms. Bentley-Smith presented proposed recommendations related to HR 169, which charged a Task Force convened by the Board of Regents to examine ORP and TRSL retirement plans and their potential impacts on staff and faculty recruitment and retention. The Task Force reviewed best industry practices, looked at other states' approaches to see how higher education retirement plans are managed, identified and discussed employer contributions in Louisiana and compared to other states, and noted possible modifications to statutory language.

Ms. Bentley-Smith stated that the final Task Force meeting will be held December 18, 2025, with its report due by January 15th, prior to the next Board meeting. The final report will be shared with Board members for review and approval at the January Board meeting.

FACILITIES AND PROPERTY

CONSENT AGENDA

Mr. Chris Herring, Associate Commissioner for Facilities Planning and Emergency Management, summarized the Consent Agenda's Small Capital Projects report, containing the projects approved by staff since the previous meeting:

Small Capital Projects

1. **LSU-A: Baseball and Softball Locker Room, Alexandria, LA** – Louisiana State University - Alexandria, Auxiliary Revenues/Private Donations \$900,000
2. **LSU-A: Highway Lighting Project, Alexandria, LA** – Louisiana State University - Alexandria, Auxiliary Revenues/Legislative Appropriation \$350,000
3. **LSU A&M: Miller Hall Exterior Envelope Repairs, Baton Rouge, LA** – Louisiana State University and A&M College, Auxiliary Revenues \$302,520
4. **LSU A&M: Oyster Hatchery Repairs (Budget Increase), Grand Isle, LA** – Louisiana State University and A&M College, FEMA Proceeds \$453,480
5. **LSU A&M: Patrick F. Taylor Hall Chilled Water Tertiary Pump Replacement, Baton Rouge, LA** – Louisiana State University and A&M College, Operational Funds \$192,354
6. **LSU A&M: River Road Annex Building Chiller Replacement, Baton Rouge, LA** – Louisiana State University and A&M College, LSU Emergency Repair Fund \$224,000
7. **LSU A&M: School of Veterinary Medicine North Kennel Renovations for Doggie Daycare Relocation, Baton Rouge, LA** – Louisiana State University and A&M College, Operational Funds \$181,032
8. **LSU A&M: Student Union Domestic Water Heater Installation, Baton Rouge, LA** – Louisiana State University and A&M College, Auxiliary Revenues \$250,000
9. **LSU HSCNO: Center for Advanced Learning and Simulation Building Loading Dock Modifications, New Orleans, LA** – Louisiana State University Health Sciences Center New Orleans, Operational Funds \$248,500

On motion of Regent Mire, seconded by Regent Aubrey, the Facilities and Property Committee voted unanimously to recommend approval of the Small Capital Projects report.

ACT 959 PROJECT: LSU HEADHOUSE RENOVATION

Act 959 of 2003 permits institutions to initiate certain capital projects not exceeding \$10M that are funded with self-generated/auxiliary revenues, grants, donations, or local/federal funds. The Louisiana State University (LSU) Board of Supervisors, on behalf of LSU A&M College, submitted a request for the purpose of renovating the Headhouse facility to serve the LSU community.

The Headhouse building formerly provided access to greenhouses that extended off the rear of the building. With the construction of Camellia and Azalea Halls in 2021, the greenhouses were demolished and only the Headhouse was preserved. The facility is currently vacant and in disrepair. This project will renovate the Headhouse to provide a new food service location and common area for the LSU community. The project scope involves renovations to the interior and exterior of the existing 3,470 square foot facility, surrounding site improvements, and abatement. The renovated space will contain a new dining area, market, restrooms, and interior and exterior gathering spaces. The total project cost of \$5.7M will be funded with self-generated revenues provided by LSU Auxiliary Services.

On motion of Regent Aubrey, seconded by Regent Levy, the Facilities and Property Committee voted unanimously to recommend approval of the Act 959 project request submitted by the Louisiana State University Board of Supervisors, on behalf of Louisiana State University and A&M College, for the purpose of renovating the Headhouse facility to create a new food service establishment and common space to serve the LSU community.

OTHER BUSINESS AND ADJOURNMENT

There being no further business to come before the Facilities and Property Committee, the meeting was adjourned at 11:52 a.m.

STATEWIDE PROGRAMS

CONSENT AGENDA

- A. Approval of Final Rulemaking – M.J. Foster Promise Program Rulemaking to Implement Act 633 and Act 102 of the 2024 Regular Session of the Louisiana Legislature.

Robyn Lively, Senior Attorney for the Louisiana Office of Student Financial Assistance (LOSFA), explained that at its August 28, 2024, meeting, the Board of Regents authorized publication of a Notice of Intent to implement Acts 633 and 102 of the 2024 Regular Session of the Louisiana Legislature.

Act 633 gradually reduces the age requirement for M.J. Foster Promise Program recipients, and Act 102 provides that the Louisiana Workforce Investment Council shall convene the Advisory Council, not the Board of Regents and the term “one-year” shall be defined. The LOSFA Advisory Board recommends that the Board of Regents authorize the Executive Director of LOSFA to publish the final rule to implement Act 633 and Act 102 of the 2024 Regular Session of the Louisiana Legislature.

- B. Approval of Final Rulemaking – TOPS Rulemaking to Implement Act 211 of the 2024 Regular Session of the Louisiana Legislature which amends Sections 301, 704, 804, 1203 and deletes Chapter 13 of the Scholarship and Grants Rules.

Ms. Lively explained that this rulemaking implements Act 211 of the 2024 Regular Session of the Louisiana Legislature. Act 211 adds a requirement that students must earn one Carnegie unit of credit in Computer Science to meet the TOPS Tech, Opportunity, Performance, and Honors core curricula. The Act provides that this credit will be obtained as a math elective or a science elective for either core. Students pursuing the TOPS Tech core may also earn this credit as one of the nine credits in Jump Start course sequences. Students pursuing the TOPS Opportunity, Performance, and Honors core can earn this credit as an alternative to foreign language. The LOSFA Advisory Board recommends that the Board of Regents

authorize the Executive Director of LOSFA to publish the final rule to implement Act 211 of the 2024 Regular Session of the Louisiana Legislature which amends Sections 301, 704, 804, 1203 and deletes Chapter 13 of the Scholarship and Grants Rules.

- C. Chafee Educational and Training Voucher (ETV) Program Rulemaking - Rulemaking to implement provisions of the Consolidated Appropriations Act of 2021 that provide that the Chafee ETV shall be awarded without regard to financial need.

Ms. Lively explained that LOSFA administers the Chafee Educational and Training Voucher (ETV) program in accordance with a Memorandum of Understanding (MOU) with the Department of Children and Family Services (DCFS). This rulemaking indicates that a student may receive the full Chafee ETV even if they have other sources of financial aid that meet their full cost of attendance, and the Chafee ETV is not to be included as other financial assistance when determining a student's eligibility for federal financial aid. The LOSFA Advisory Board recommends that the Louisiana Board of Regents authorize the Executive Director of LOSFA to publish a notice of intent to make these rules permanent.

- D. Regional Contract Program (RCP) Exception – Request for exception to the Regional Contract Program requirement that a student begin the obligation to work in Louisiana or to repay the amount received within 6 months of completing their program of study.

Ms. Lively informed the Regents that one request for an exception to the Regional Contract Program requirement that a student begin the obligation to work in Louisiana or to repay the amount received within 6 months of completing their program of study was reviewed and approved by the LOSFA Advisory Board at its meeting of December 4, 2024. The student presented facts and documentation that the student believes justify the granting of an exception as an exceptional circumstance, and the LOSFA Advisory Board recommends Board of Regents approval.

- E. TOPS Home Study Exceptions – TOPS statutory provision that requires a student to begin a home study program no later than the conclusion of the tenth grade.

Ms. Lively informed the Regents that two requests for an exception to the deadline to begin a home study program were reviewed and approved by the LOSFA Advisory Board at its meeting of December 4, 2024. The students presented facts and documentation that the students believe justify the granting of an exception as an exceptional circumstance, and the LOSFA Advisory Board recommends Board of Regents approval.

- F. TOPS and M.J. Foster Exceptions – TOPS regulatory provisions that require students to remain continuously enrolled and to earn the annual credit hours required during the academic year and to the M.J. Foster requirement that a student maintain continuous enrollment in school.

Ms. Lively informed the Regents that twelve requests for exception to the TOPS requirements were reviewed and approved by the LOSFA Advisory Board at its meeting on December 4, 2024. One request for exception to the M.J. Foster continuous enrollment requirement was reviewed and approved by the LOSFA Advisory Board at its meeting on December 4, 2024. The students presented facts and

circumstances that the students believe justify the granting of an exception as an exceptional circumstance, and the LOSFA Advisory Board recommends Board of Regents approval.

On motion of Regent Creed, seconded by Regent Orr, the Statewide Programs Committee voted unanimously to approve the Consent Agenda items in globo.

OTHER BUSINESS

Robyn Lively updated the Board of Regents on funding remaining for the M.J. Foster Promise Program for the 2024–2025 academic year.

PLANNING, RESEARCH, AND PERFORMANCE

Dr. Susannah Craig presented the Consent Agenda, which included one renewal application for licensure of academic degree-granting institutions, as well as two initial applications and 26 renewal applications from the Advisory Commission on Proprietary Schools.

CONSENT AGENDA

- a. **R.S. 17:1808 – Academic Licensure**
 - 1. **Renewal Applications**
 - a. Pepperdine University
- b. **Proprietary Schools Advisory Commission**
 - 1. **Initial Applications**
 - a. AGI CDL Driving Academy – Lake Charles, LA
 - b. Shreveport-Bossier City Massage Academy – Shreveport, LA
 - 2. **Renewal Applications**
 - a. 160 Driving Academy-Metairie – License #2340
 - b. Academy of Interactive Entertainment, Lafayette – License #2136
 - c. Ayers Career College, Shreveport – License #828
 - d. Becker Online, Downers Grove, IL – License #2368
 - e. Clinical Lynks, New Orleans – License #2376
 - f. Coastal College, Baton Rouge – License #2019
 - g. Coastal Truck Driving School of New Orleans – License #2200
 - h. Crescent City School of Gaming and Bartending, New Orleans – License #594
 - i. Delta College, Covington – License #947
 - j. Delta College-Slidell Branch – License #2066
 - k. Diesel Driving Academy, Shreveport – License #369
 - l. Durham Transport Academy, Shreveport – License #2341
 - m. Joshua Career Institute of Louisiana, Shreveport – License #2307
 - n. Lafayette Dental Assistant School – License #2251
 - o. Mia's Medical Academy, Baton Rouge – License #2202
 - p. National Aesthetic Laser Institute, Baton Rouge – License #2295
 - q. New Orleans Dental Assistant School, Metairie – License #2252

- r. Over Drive Truck Driving School of Louisiana, Deville – License #2283
- s. Pelican Chapter-ABC-Baton Rouge – License #2172
- t. Pelican Chapter-ABC-Southwest Campus, Westlake – License #2173
- u. Road Ready Driving Academy, Houma - License #2367
- v. Shreveport Dental Assistant School - License #2253
- w. The Microblading Institute, Maurice - License #2324
- x. Thomas Training and Developmental Center, Franklin - License #948
- y. Unimed Academy – New Orleans - License #2378
- z. Woodland Healthcare Training, Denham Springs - License #2284

On motion of Regent Sterling, seconded by Regent Aubrey, the Planning, Research and Performance Committee unanimously recommended that the Board of Regents approve the items listed under the Consent Agenda.

ACADEMIC AND STUDENT AFFAIRS

Dr. Tristan Denley presented the Consent Agenda, consisting of routine items including Staff Approvals.

CONSENT AGENDA

a. Routine Staff Approvals

1. **Central Louisiana Technical Community College:** Request to change the title and CIP of the Associate of Applied Science (AAS) Cloud Computing (CIP 11.0902) to AAS Cyber Security (CIP 11.1003) to more accurately reflect the program's curriculum and purpose.
2. **Delgado Community College:** Request to change the title of the AAS Polysomnographic Technology to AAS Sleep Technology to more accurately reflect the program's curriculum and purpose.
3. **Fletcher Technical Community College:** Request to change the titles of the following programs to more accurately reflect the programs curriculum and purpose: AAS Integrated Production Technologies to
 - AAS Energy Production Technologies
 - AS Cardiopulmonary Care Science to AS Respiratory Therapy
 - AAS Office Systems Technology to AAS Administrative Office Management
4. **Louisiana Delta Community College:** Request to change the title of the AAS Information Technology to AAS Computer and Information Technology to

more accurately reflect the program's curriculum and purpose.

5. Louisiana State University A&M: Request to change CIP Codes for the Bachelor of Science (BS), Master of Science (MS), and Doctor of Philosophy (PhD) in Kinesiology from (CIP 13.1314) to (CIP 31.0505) to more accurately reflect the curriculum and purpose of the degrees.
6. Northwestern State University: Request to establish an Undergraduate Certificate (UC) in Honors Professional Ethics (CIP 38.0104) and a UC in Honors Critical and Analytical Thinking (CIP 38.0101) with a progress report on implementation submitted as part of the institution's 2025 Academic Plan.
7. University of Louisiana Lafayette: Request to change the names of the following Academic Units to more closely align with national best practices across major universities and professional organizations:
 - Department of Biology to School of Biological Sciences
 - School of Music and Performing Arts to School of Music and School of Dance and Theatre
 - Department of Visual Arts to School of Visual Arts
8. University of Louisiana Monroe: Request to establish a Graduate Certificate (GC) in Marriage and Family Therapy (CIP 51.1505) with a progress report on implementation submitted as part of the institution's 2025 Academic Plan
9. University of New Orleans: Request to establish an Undergraduate Certificate in Wind Energy (CIP 14.4899), an Undergraduate Certificate in Aerospace Manufacturing (CIP 14.0201), and a Post Baccalaureate Certificate in Accounting (CIP 52.0301) with progress reports on program implementation submitted as part of the institution's 2025 Academic Plan.

On motion of Regent Creed, seconded by Regent Williams-Brown, the Committee received and recommended Board of Regents approval of the items on the Consent Agenda.

ACADEMIC PROGRAMS

Dr. Denley then presented for approval the Bachelor of Science in Marine Transportation at Nicholls State University, the Bachelor of Science in Data Science at Southern University at New Orleans, the Bachelor of Science in Neuroscience at the University of New Orleans, and the Master of Science in Allied Health at Northwestern State University.

Dr. Denley invited System President Rick Gallot, Nicholls President Jay Clune, Dr. Jeannine O'Rourke, Dr. Claire Norris, and Captain Kelly Denning to discuss the Bachelor of Science in Marine Transportation at Nicholls State University. Dr. O'Rourke noted that the maritime industry has a large impact on the economy of both Louisiana and the United States. She explained that to meet the demands of the maritime industry, the Universities of Louisiana Maritime Academy was established. Dr. Norris described the strategic partnership between the University of Louisiana System and the maritime industry and their work to develop partnerships and establish an advisory council. Dr. Clune

presented information on the Bachelor of Science in Marine Transportation and explained how the program is critical for graduates to work in the maritime industry. He then described the curriculum and noted that it meets core requirements within the maritime industry and the United States Coast Guard. Captain Denning then provided information on the next steps in continuing to develop the program and stated that they will work with Coast Guard-based instructors to create courses.

Regent Aubrey asked about the funding for the program and whether Nicholls will be seeking additional funding. President Gallot responded yes, and that they have already received a commitment from Representative Letlow for the seed money for the program. Regent Aubrey followed up by asking if this would fall in the high-cost program category and President Gallot responded that it would. Regent Aubrey asked Dr. Denley if the curriculum could be provided to the Board.

Commissioner Reed asked Captain Denning how she thinks about how to position the program for an evolving workforce. Captain Denning responded that there is an opportunity to study technology as it pertains to the maritime industry.

On motion of Regent Creed, seconded by Regent Aubrey, the Committee approved the four proposed new programs as presented.

NEW RESEARCH CENTERS

Next, Dr. Denley presented for approval the establishment of the Center for Environmental Research at Southeastern Louisiana University and the Center of Excellence in Equine Health and Sports Performance at Louisiana State University A&M.

On motion of Regent Creed, seconded by Regent Orr, the Committee recommended approval of the two new research centers as presented.

REPORTS

Dr. Denley then presented for approval the 2024 Articulation and Transfer Report. He described the work done in the previous year, including the Universal Transfer Pathways, and noted that there is still additional work to be done.

On motion of Regent Creed, seconded by Regent Williams-Brown, the Committee recommended approval of the 2023-24 Articulation and Transfer Report and to authorize the Commissioner of Higher Education to submit the report to the appropriate legislative committees on behalf of the Board of Regents.

Dr. Denley also presented for approval the 2024 Postsecondary Inclusive Education Report. He invited Mr. Mitch Dillon, a member of the Postsecondary Inclusive Education Advisory Council as well as graduate of the Bridge to Independence Program at Nicholls State University, to speak to the Board about his experiences in the program as well as how it has prepared him for what he is doing now.

Commissioner Reed commented that Mr. Dillon had testified during the 2024 Regular Legislative Session and assisted in securing an additional \$1 million dollars awarded this year. She also added that Mr. Dillon is a member of the Postsecondary Inclusive Education Advisory Council, which works to create new and expand existing programs in the state.

On motion of Regent Williams-Brown, seconded by Regent Creed, the Committee recommended approval of the 2023-24 Postsecondary Inclusive Education Report and to authorize the Commissioner of Higher Education to submit the report to the appropriate legislative committees on behalf of the Board of Regents.

RESEARCH AND SPONSORED INITIATIVES

DIVISION OF ENDOWED CHAIR INTO ENDOWED PROFESSORSHIPS: LSU AND A&M COLLEGE

Ms. Carrie Robison indicated that LSU A&M requests to divide the Paul M. Horton Chair in Chemical Engineering, a \$2 million endowed chair held by LSU and A&M College, matched by the BoRSF in FY 2006–07, into two Endowed Professorships, as follows:

- Paul M. Horton Professorship in Chemical Engineering #1, with a corpus of \$1,200,000 (\$720,000 non-state/\$480,000 BoRSF)
- Paul M. Horton Professorship in Chemical Engineering #2, with a corpus of \$800,000 (\$480,000 non-state/\$320,000 BoRSF)

She noted that LSU A&M has certified that the original donor approved this conversion. LSU Board of Supervisors approval was granted at its October 10, 2024 meeting.

On motion of Regent Mire, seconded by Regent May, the Committee recommended approval of the division of the Paul M. Horton Chair in Chemical Engineering into two (2) endowed professorships, as follows: (1) Paul M. Horton Professorship in Chemical Engineering #1, with a corpus of \$1,200,000 (\$720,000 non-state/\$480,000 BoRSF) and (2) Paul M. Horton Professorship in Chemical Engineering #2, with a corpus of \$800,000 (\$480,000 non-state/\$320,000 BoRSF).

FY 2025–26 BOARD OF REGENTS SUPPORT PLAN AND BUDGET RECOMMENDATIONS

Ms. Robison provided an overview of the constitutionally designated Board of Regents Support Fund and the requirement to provide a budget to the Governor and the Legislature for the coming fiscal year for consideration during the 2025 Regular Legislative Session. She reviewed recent trends in revenue generation and summarized the process for identifying a base funding level for the next fiscal year. She also noted that Act 1 of the Third Extraordinary Session of 2024, if approved by the voters in March 2025, will repeal the Support Fund effective immediately, so this Plan and Budget may not be taken up by the Legislature or enacted.

Following the background review, Ms. Robison indicated that a base budget of \$17 million was recommended by staff and committees advisory to the Board. She noted that the recommended budget is aligned with the official estimate provided by the Revenue Estimating Conference. She noted that though continuing extremely low revenue estimates threatens the viability of Support Fund programs, the recommended budget is appropriate and sufficient to retain all existing programs.

Ms. Robison then provided a breakdown of the budget request by program and subprogram, acknowledging prior commitments, administrative costs, and funds for new projects, as well as contingency plans if revenues in FY 2025–26 exceed or fail to meet the base budget level.

On motion of Regent May, seconded by Regent Shamieh, the Research and Sponsored Initiatives Committee recommended approval of the FY 2025-26 Board of Regents Support Fund Plan and Budget, with contingencies, as presented.

PERSONNEL

APPOINTMENT OF DEPUTY COMMISSIONER FOR FINANCE AND ADMINISTRATION POSITION

Commissioner Kim Hunter Reed presented the recommendation to approve the appointment of Ms. Elizabeth Bentley-Smith as Deputy Commissioner for Finance and Administration. Commissioner Reed shared that Ms. Bentley-Smith has been with the Board of Regents since 2021 and currently serves as the Interim Deputy Commissioner for Finance and Administration. Prior to her time at the Board, Ms. Bentley-Smith worked at the Office of Planning and Budget within the Louisiana Division of Administration and taught classes in American Government as a faculty member at multiple universities. Commissioner Reed provided additional comments on the work accomplished by Ms. Bentley-Smith while at Regents.

On motion of Regent Temple, seconded by Regent Sterling, the Personnel Committee approved the appointment of Elizabeth Bentley-Smith as Deputy Commissioner for Finance and Administration.

MEAUXMENTUM MOMENT

Dr. Denley announced that the Ascendium Educational Foundation has pledged \$3.8M to support student success reforms in Louisiana. The funds will be used to help implement the Meauxmentum Framework across institutions, in addition to continue the annual Meauxmentum Summit.

Dr. Denley also highlighted several other national organizations supporting the Meauxmentum Movement in Louisiana, including Arnold Ventures, which has pledged \$200,000 to support academic planning.

REPORTS AND RECOMMENDATIONS BY THE COMMISSIONER OF HIGHER EDUCATION

Commissioner of Higher Education Kim Hunter Reed presented several items to the Board:

- She congratulated LSU Eunice and River Parishes Community Colleges, which were among 200 colleges recognized by the U.S. Department of Education for their efforts to increase degree completion.
- She mentioned the recent allocation of \$50M in grants for higher education institutions through Gumbo 2.0. These grants are to develop talent in computer science, cybersecurity, and healthcare.

- She asked Chair Cordell and Regent May to discuss the recent announcement of a \$10B investment in northeast Louisiana by Meta to establish a data center. This facility will be the first of its kind in Louisiana, promising 500 new jobs and immense potential for further growth. It is the most advanced AI and data center ever to be built.
- She announced that Dr. Tristan Denley received a national honor, the Stan Jones Award, for his outstanding innovative work in higher education.

OTHER BUSINESS AND ADJOURNMENT

There being no further business to come before the Board, on motion of Regent Temple, seconded by Regent Creed, the meeting was adjourned at 3:00 p.m.

Appendix A
Board Meeting Guest List
Wednesday, December 11, 2024

| NAME | AFFILIATION |
|---------------------|---------------------------|
| Shelly Gill | LSUA |
| Samantha Evans | LSUA |
| Amy Mathews | Treasury |
| Lindsay Schexnayder | Treasury |
| Mary Kathryn Drago | Treasury |
| Jessica Lemoine | LCTCS |
| Simone Champagne | BESE |
| Nicole Foster | LSU |
| Tameka Moten | |
| Andrea M. Miller | |
| Mary Pritchard | Feeding Louisiana |
| Wendi Palermo | LCTCS |
| Margaret Trich | LSU A&M |
| Joe Salter | LSU A&M |
| Jackie Bach | LSU A&M |
| Darrell P. Kruger | University of New Orleans |

AGENDA ITEM VII.

Revision of the Bylaws for the Internal Operation and the Transaction of Business for the Board of Regents

Currently, under the Board of Regents' internal procedure under BPP 4.1 (a), the Nominating Committee's recommendations to the board include a representative to serve on the Board of Regents' Proprietary Schools Advisory Committee.

Under the law, the Proprietary Commission members serve a term of 4 years. In recent years, there have been numerous off-cycle appointments to the Commission due to vacancies arising before the end of the four-year term of the Board of Regents' appointees to the Proprietary Schools Advisory Commission. Therefore, the timing of the Board's appointment of a representative to the Proprietary Schools Advisory Commission no longer corresponds to the Board's action on the Nominating Committee's recommendation in December.

The Board still has the final authority to make appointments to this Commission, as recommendations for such appointments will be brought to the Board as and when a Board appointee vacates the Commission. It would simply not be a regular function of the Nominating Committee. The proposed change will simply delete reference to the Proprietary School Advisory Commission from the functions of the Nominating Committee. In the future, staff will bring a proposed appointee to the Board for its approval when vacancies arise.

STAFF RECOMMENDATION

Senior Staff recommends approval of the proposed amendment to the Board Policies and Procedures BPP 4.1 to streamline the process of appointments to the Proprietary Schools Advisory Commission.

| Louisiana Board of Regents Bylaws Policies and Procedures | |
|--|--|
| Policy Number | BPP 4.1. (a) |
| Chapter | Bylaws |
| Effective Date | 3/23/11 |
| Subject | Election of New Officers to the Board |

Procedures

In October of each year, the Board Secretary submits the list of returning incumbent members from the previous year to the Board Chair. The Board Chair will select from the list a Chair of the Nominating Committee and four additional Board members to serve on the Committee.

At the regularly scheduled meeting of the Board in December, the Nominating Committee shall submit a slate of nominees to the Board for the following positions:

1. Board Officers other than Chair – Vice Chair, Secretary;
2. Four Non-Officer Members to also serve on the Executive Committee; and
3. ~~One representative to serve on the Board of Regents' Proprietary Schools Advisory Commission.~~

A majority vote of the Board is required to fill each position for the next year. These officers shall be installed at the scheduled Board meeting



BOARD of REGENTS
STATE OF LOUISIANA

Kim Hunter Reed, Ph.D.
Commissioner
of Higher Education

Misti S. Cordell
Chair
At-Large

David J. Aubrey
At-Large

Christian C. Creed
5th Congressional District

Blake R. David
3rd Congressional District

Stephanie A. Finley
3rd Congressional District

Phillip R. May Jr.
1st Congressional District

Darren G. Mire
2nd Congressional District

Kennedy M. Orr
Student Member

Wilbert D. Pryor
4th Congressional District

K. Samer Shamieh, M.D.
1st Congressional District

Terrie P. Sterling
At-Large

Collis B. Temple III
6th Congressional District

Judy A. Williams-Brown
4th Congressional District

Board of Regents Meeting as a Committee of the Whole

Agenda

Audit

Tuesday, January 28, 2025

11:00 AM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

IX. Reports and Recommendations

A. Audit

1. EisnerAmper Internal Audit Presentation
 - a. Internal Audit Status Update
 - i. LUMCON Vessel Day-Rates
 - b. FY25 Audit Plan Update for Approval



BOARD of REGENTS
STATE OF LOUISIANA

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1st Congressional District

Terrie P. Sterling
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Collis B. Temple III
6th Congressional District

Judy A. Williams-Brown
4th Congressional District

Board of Regents Meeting as a Committee of the Whole

Agenda

Finance

Tuesday, January 28, 2025

11:10 AM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

IX. Reports and Recommendations

B. Finance

1. Five-Year Funding Formula Approval
2. HR 169 Task Force Report Approval

IX. Reports and Recommendations

B. Finance

1. Five-Year Funding Formula Approval

Through Constitutional [Art. 8, Sec. 5(D)(4)] and statutory [R.S. 17:3129.2(B)] authority, the Board of Regents (BOR) allocates State General Funds to the four postsecondary systems by way of an outcomes-based funding formula. In early 2024, the BOR, in partnership with all public higher education systems, initiated an agreed-upon five-year review of the state's higher education funding formula. As a part of the process, Regents and the systems have worked jointly and collaboratively using the current funding model to develop the next funding formula iteration. This represents the third time the BOR has conducted a review of the funding formula since the legislature enacted outcomes-based funding in 2014 and implemented it in Fiscal Year 2016–2017. Once approved, the new formula funding model may be implemented for the Fiscal Year 2025–2026 formula allocation.

Charge: As charged by the Legislature and Constitution, the formula is designed to continue aligning fiscal policy for higher education to drive improved outcomes at public postsecondary institutions across the state. This review process assessed the impact of all components of Louisiana's current funding formula against the best funding formulas in the nation to identify suggestions for improvement.

Objective: To provide a cohesive and successful strategy, through collaboration with the systems, to allocate funding to two-year and four-year institutions by rewarding student success through progression, completion, and workforce development aligned with the Higher Education Master Plan goal of 60% of all working-age adults in Louisiana holding a degree or high-value credential by 2030.

Challenge: Developing an agreed-upon funding allocation model presents a three-fold challenge:

- 1) State support for higher education, including formula funding, is estimated to be underfunded by more than \$700 million.
- 2) Incentives aligned with performance must be applied and measured for institutions within each sector while accounting for differing roles, scopes, and missions.
- 3) The model must reward performance appropriately to increase student and institutional success across all institutions while also abiding by state law to protect institutions against drastic and rapid changes in funding levels.

Best and Promising Practices: The Board of Regents engaged experts from the National Center for Higher Education Management Systems (NCHEMS) to provide high-level research identifying the best and most promising funding formula practices across the country. These experts helped inform Advisory Committee members of the impacts of proposed changes and how they compare to other states.

Advisory Committee Membership: The work of developing a funding formula for postsecondary education is required by state law but also remains essential as a collaborative process. The membership of the Advisory Committee included representation from each public system and its institutions (two from the system office and one from a member institution). All members discussed, advised, and recommended changes to the formula. In addition to three representatives from the Board of Regents, membership included 12 system representatives as noted below:

- System CFOs (four, one from each system)
- System CAOs (four, one from each system)
- System-appointed institutional representatives (four, one from a degree-granting institution within each system)

Timeline: The Advisory Committee began meeting at the end of March 2024. The initial meetings laid the groundwork by providing a review of the present Louisiana funding formula, including outcome metrics and perspectives of national funding formula models and trends. The next set of meetings focused on revision ideas, additions, and alternative proposals focusing discussion on institutional credit and non-credit instruction, workforce development, research, dual enrollment, reverse transfers, institutional tiers based on mission, rewarding transfers, reconsidering the Cost component, and improving adult education outcomes.

Based on discussions, feedback for the proposed model was received during Advisory Committee meetings, as well through surveys of individual workgroup members and systems.

Proposed New Funding Formula: The new formula proposed for Board consideration is more aligned with the Regents goals of increasing completers especially in high demand areas, ensuring mission specific formulas based on institution types and increases funding for outcomes. It is simpler and specifically recognizes that one size does not fit all institutions by using metrics that recognize and reward distinctions in institutional missions and scopes. The proposed formula also rewards improved student outcomes, as well as dual enrollment and work-based learning; continues rewarding the student path to completion through progression, transfers, and graduate completers; incentivizes research as a stand-alone component; and avoids drastic shifts in funding among universities as required by law.

To accomplish strong workforce alignment, the proposed formula uses a new methodology incorporating Louisiana Workforce Commission (LWC) labor market data to reward completion of credentials leading to occupations that are in greatest demand and provide high rewards.

According to NCHEMS, this approach provides one of the most robust workforce calculations in the nation, while also increasing alignment to the stated Master Plan goal of 60% of all working-age adults in Louisiana holding a degree or high-value credential by 2030.

To summarize, the major formula changes include the following:

- Increased emphasis on educational attainment in high-demand and high-reward disciplines aligned to workforce needs
- Focus on student success
- Money follows the student – Full-time enrollment (FTE)-based model
- Larger Base component than previous model (65%)
- Larger Outcomes component than previous model (35%)
 - Absorbs the previous formula's Cost model within Base and Outcomes
- Maintains practice of not funding 100% online, out-of-state students and not funding associate's degree completers at universities.

Additionally, the proposed Funding Formula model includes a stand-alone Research variable (four-year institutions) and Validated Skills and Learning (two-year institutions).

- 1) Research Focus
 - While recognizing progress in research funding is an important aspect of the current formula, that should not happen at the detriment of recognizing and rewarding progress towards the attainment goal. The proposed formula structure sets a specific funding amount to support research and ensures that the emphasis on educational attainment in high-demand, high-reward programs is at the forefront.
- 2) Validated Skills and Learning (Short-term Credentials)
 - The existing formula provides funding only for outcomes connected with “for-credit” programs. The proposed formula introduces a new methodology that will allow recognition of all validated skills and learning credentials (short-term credentials) at two-year institutions. This component of the model has been developed to support the legislative request for workforce funding.

Collaborative Process: The proposed funding formula model has been developed through an Advisory Committee representing all public higher education systems (LSU, SUS, ULS, and LCTCS). Further, the Board Chair, Commissioner of Higher Education, and system presidents have reviewed and discussed the funding formula recommendations.

STAFF RECOMMENDATION

Senior Staff recommends that the Board approve the Five-Year Funding Formula Model.

2. HR 169 Task Force Report Approval

During the 2024 Regular Legislative Session, House Resolution 169 established a task force to study and examine various aspects of the optional retirement plans (ORPs) within the Teacher's Retirement System of Louisiana (TRS) in relation to the unclassified staff and faculty recruitment and retention crisis faced by Louisiana's public postsecondary education institutions.

The Task Force was comprised of 15 total members who represent both TRSL and ORP participants in each of the four higher education systems, Board of Regents, and TRSL along with the Actuary for the Louisiana Legislative Auditor, who served as an ex-officio member.

HR 169 directed eight responsibilities of the Task Force, which included reviewing industry best practices related to individual ORP savings plans; the management of retirement plans in other states; the pros and cons of ORP plans; what other states offer to their respective public postsecondary employees; the feasibility of permitting ORP participants to change their retirement plan decisions; employer contribution rates for defined benefit pension and ORP plans; definitions of "higher education" and "postsecondary education" as interpreted by TRSL in the administration of retirement plans; and other issues of which the Legislature should be aware as determined by the Task Force.

The Task Force was charged with providing the legislature recommendations regarding any applicable changes to ORP plans. At its final meeting on Wednesday, December 18, 2024, the Task Force approved the following final recommendations:

- 1) Provide ORP eligibility to certain employees within the Louisiana Community and Technical College System;
- 2) Increase the irrevocable decision timeframe, currently five years (Act 109 of the 2024 Regular Legislative Session), to seven years, to align with tenure decisions;
- 3) Provide ORP membership participation on the TRSL Board through the creation of an advisory committee of ORP members and adding a member to the TRSL Board;
- 4) Increase employer contributions to ORP accounts by establishing a minimum employer contribution rate equal to the employee's required contribution to ensure equitable and competitive retirement benefits and require any unfunded accrued liability (UAL) savings be retained in higher education to offset these costs;
- 5) Request a legislative study of a phased retirement program; and
- 6) Revise TRSL membership eligibility for new hires to make it optional for new hires who are over 60 years old or those persons 55 and older with 40 quarters or more in Social Security.

In order to meet the legislative timeline for report submission by January 14, this agenda item was discussed with the Board at its December meeting.

STAFF RECOMMENDATION

Senior Staff recommends that the Board receive the House Resolution 169 Task Force Report.



BOARD of REGENTS
STATE OF LOUISIANA

A large, faint watermark image of the Louisiana State Capitol building is visible in the background, appearing as a dark silhouette against a lighter blue gradient.

TRSL-ORP TASK FORCE 2024 REPORT

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IMAGE SOURCES (Covers): Getty Images.

Introduction

House Resolution No. 169 (HR 169) of the 2024 Regular Legislative Session (Appendix A) created the Teacher's Retirement System of Louisiana (TRSL) and Optional Retirement Plan (ORP) Task Force. Under the jurisdiction of the Board of Regents, the Task Force (Appendix B) is charged to study the unclassified staff and faculty recruitment and retention crisis faced by Louisiana's public postsecondary education institutions as it relates to retirement options provided by the state. Data from both national and state sources are used to inform this report.

Understanding the recruitment and retention issues faced by postsecondary education institutions is critical to continue and build talent development within Louisiana. Higher education is an economic development engine, training the workforce, driving research, and nurturing innovation. As a result of this, the market for faculty and highly skilled staff is both national and international. It is imperative that institutions remain competitive with other states as well as private industry in attracting the best, most productive faculty and staff to educate and develop Louisiana's future talent base. Understanding challenges in recruitment of highly qualified and productive personnel and developing strategies to address them is at the heart of this legislative call to action.

In total, HR 169 identified eight issues to be examined by the Task Force. This report responds to all of those, providing recommendations and highlighting areas for awareness.

Background on Retirement Options

Currently faculty and other unclassified public postsecondary institution staff have two retirement options when state service begins: a defined benefit plan or defined contribution plan. For these employees, the retirement options set forth below are offered by TRSL.

Defined Benefit (DB) Plan

A defined benefit plan is an employer-sponsored retirement plan that provides workers, upon attainment of designated age and service thresholds, with a lifetime monthly benefit based on the employee's salary and length of service.

Defined Contribution (DC) Plan

A defined contribution plan is an employer-sponsored retirement plan in which the employer provides a retirement savings vehicle for its employees, and also typically makes a contribution to the employee's retirement account.

It should be noted that Louisiana is one of only a few states in the country in which most state employees do not contribute to Social Security. As a result, those employees do not gain eligibility for Social Security benefits. The other non-Social Security states are Alaska, Colorado, Maine, Massachusetts, Nevada, and Ohio.

For Louisiana participants, TRSL operates the DC plan through its Optional Retirement Plan (ORP), which was created legislatively in 1989 through Act 90. The ORP allows account holders to save and invest their retirement assets on a tax-deferred basis through private carriers contracted with the program. The ORP was adopted as a means to enhance recruitment of higher education faculty and staff by providing participants a retirement benefit with increased portability. Eligible employees can enroll in the ORP at any point before earning five years of TRSL service credit (DB plan). It should be noted that if the election is made within 60 days of employment, both employee and employer contributions transfer to the ORP account; however, if the election is made after 60 days but before earning five years of TRSL service credit, only employee contributions transfer to the ORP account. From the beginning of the program until the enactment of Act 109 of the 2024 Regular Legislative Session (described in the Recommendations section), the election to participate in the ORP was irrevocable.

TRSL Plan Information

As noted above, TRSL offers two programs for participants to join. Below are general overviews of each program based on TRSL brochures for the Regular Plan (DB) and ORP (DC). The brochures for each plan are provided as Appendix C and Appendix D.

Regular Plan

The individual's retirement is funded by a percentage of their salary and contributions from their employer. The employee and employer contributions are transferred to TRSL and maintained in a trust fund. TRSL then pools and invests the contributions. These contributions and the interest earned on TRSL investments pay for the employee's future lifetime retirement benefits.

The lifetime retirement benefit is calculated using a formula set by state law. This formula calculates the maximum unreduced¹ monthly retirement benefit for which the employee is eligible and is based upon three factors:

1. TRSL service credit
2. Final average compensation (FAC), and
3. Benefit factor of 2.0% or 2.5% (depending on plan membership)

Service credit is the amount of time the employee works and contributes to TRSL. It can also include certain unused sick and/or annual leave. TRSL converts the unused sick and/or annual leave to service credit at the time the employee retires. TRSL uses service credit for two purposes: (1) to determine when the employee is eligible to retire, and (2) to calculate the retirement benefit.

The FAC is the average of the employee's highest years of salary consecutively earned. TRSL looks at the employee's entire salary history to find the three or five years (depending on enrollment date) of highest consecutive earnings to calculate the FAC, based upon when the employee first became a member.

The benefit factor is a percentage used to calculate the employee's retirement benefit. The employee's retirement plan and the date the employee joined TRSL determine which benefit factor will be used to compute the retirement benefit.

¹ – Members may retire at any age with at least 20 years of service credit, which is considered an early retirement. Therefore, the retirement benefit is actuarially reduced based upon the number of years it would have taken the member to reach regular retirement eligibility.

An example of the benefit formula would be an employee who worked for 30 years, has an FAC of \$58,000, and a benefit factor of 2.5%. This employee would receive an annual benefit of \$43,500, or \$3,625 per month.

30 years of service x \$58,000 FAC x 2.5% benefit factor = \$43,500 annual benefit

ORP

An ORP account is owned by the participant, and there is no waiting period to join the plan. ORP participants are 100% vested from the date of enrollment. The ORP participant selects one of three ORP carriers to invest retirement contributions. Employer and employee contributions are invested by the designated ORP carrier in the investment options chosen by the participant. The performance of the participant's investments determines the retirement benefit. ORP carriers provide projections of possible (not guaranteed) benefits.

Employees contribute 8% of their salary (less a 0.05% administrative fee to TRSL) to the account. Employers contribute a minimum of 6.2% of the employee's salary to the employee's account. For higher education employees, the management boards may, through board resolution, establish a rate above 6.2% (R.S. 11:927).

An administrative fee, mentioned above, is collected from ORP participants to cover the cost of administration and maintenance of the optional retirement plan since TRSL trust fund dollars cannot be used for ORP costs. The administrative fee covers TRSL expenses for ORP such as:

- Consultants to assist with plan administration, compliance, monitoring, and reporting;
- A portion of TRSL staff compensation for employees to reconcile and transfer contributions to vendors, process enrollments, conduct consultant and vendor searches, and work with consultants on plan and investment matters;
- External legal fees to address legal or federal tax compliance matters; and,
- Other ORP-related expenses such as insurance and bank fees.

When the ORP employee is ready to retire, three payment options are available:

- **Lifetime Benefit:** The employee receives a lifetime (or joint and survivor lifetime) benefit with annuity payments based on the entire balance in the ORP account at the time payments begin.
- **Lump-Sum Benefit:** ORP monies cannot be distributed as a cash distribution payable to the participant as a single lump sum. However, a one-time, lump-sum payment of up to 36 months of the annuity is available from the ORP account at the time of retirement, in addition to a lifetime annuity. If the up-front lump sum is chosen, lifetime benefits are reduced accordingly (La. R.S. 11:929B).
- **Rollover:** The employee may roll over all or a portion of the ORP account balance to an Individual Retirement Account (IRA) or qualified retirement plan.

Task Force Overview

HR 169 requested that the Commissioner of Higher Education call the first meeting of the TRSL and ORP Task Force to take place no later than August 1, 2024, and that the Task Force submit a report of its findings to the House Committee on Retirement no later than 90 days prior to the start of the 2025 Regular Legislative Session (January 14, 2025). To meet these requirements, the Task Force met for the first time on July 31, 2024, and set a meeting schedule to conclude in December 2024.

Over that period of time, the Task Force members heard from Regents staff about retirement plan options available to faculty and staff at public Louisiana colleges and universities. The Task Force received presentations from Keith Brainard with the National Association of State Retirement Administrators, who discussed Southern states with ORP plans, and Kenneth Herbold, the actuary for the Louisiana Legislative Auditor, who discussed the calculation of the employer contribution, costs associated with plan changes, and the pros and cons of ORPs. Katherine Whitney, Executive Director of TRSL, provided a presentation on the history of the ORP and how the ORP works, including an explanation of the administrative fees associated with the ORP, and an overview of the TRSL defined benefit plan. Each of the three ORP vendors, TIAA-CREF, Voya Financial, and Corebridge Financial, gave a presentation on the services they provide for members.

Finally, the State Treasurer's Office shared information related to Social Security and ORP as well as the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO)². The Task Force then formulated and approved report recommendations after extensive discussions.

2 – Note that the WEP and GPO were repealed by the Social Security Fairness Act of 2023 which was signed into law by President Biden on January 5, 2024.

Current Membership

Based on the 2024 actuarial valuation approved by the TRSL Board of Trustees on October 3, 2024, within higher education 16,480 active members participate in the DB plan and 6,922 active participants in ORP. The breakdown by system, along with total payroll and employer contribution amounts, is provided below.

Employer Contribution Rates

The contribution amounts detailed below are based on the employer contribution rate. For both plans (DB and ORP), the employer contribution rate includes the unfunded accrued liability rate for that fiscal year. In Fiscal Year 2023-2024 (FY24), the shared UAL rate was 20.16%.

For ORP members, the employer contribution rate included the 6.2% rate discussed in the Plan Information section above. As a result of this, the employer contribution rate in FY24 was 26.4% of each ORP member's salary.

For DB plan members, the employer contribution rate included the normal cost and administrative expense rate. The normal cost is the cost of benefits earned by current active employees that is allocated to the current year. For FY24, the normal cost for higher education employers was 2.788%. The administrative expense rate includes expenses associated with the operations of TRSL and is determined as a percentage of the projected payroll of all active members. The administrative expense rate for FY24 for higher education employers was 0.37%. For DB plan members, the employer contribution rate for higher education in FY24 was 23.36% of each DB member's salary.

Table 1. Employer Contribution Rates.

| FY24 Plan Expense Rates | ORP | DB |
|-------------------------|---------------|---------------|
| ORP Rate | 6.2% | — |
| Normal Cost | — | 2.788% |
| Administrative Expenses | — | 0.37% |
| Shared UAL Expense | 20.16% | 20.16% |
| FY24 Total | 26.36% | 23.32% |

Source: TRSL June 30, 2022 Actuarial Valuation and [TRSL Website](#)

Table 2. Defined Benefit Plan Membership.

| System | Member Count | Total Payroll | Employer Contribution |
|-------------------------|---------------|----------------------|-----------------------|
| Board of Regents | 140 | \$8,712,590 | \$2,030,033 |
| LSU System ¹ | 6,076 | \$420,918,546 | \$98,142,889 |
| SU System ² | 1,396 | \$80,431,348 | \$18,759,832 |
| UL System | 5,797 | \$303,888,679 | \$70,806,062 |
| LCTC System | 3,071 | \$152,025,020 | \$35,421,830 |
| Total | 16,480 | \$965,976,183 | \$225,160,647 |

Source: TRSL, 2024

1 – LSU System includes University Laboratory School, Health Care Services Division, and Lallie Kemp

2 – SU System includes Southern Laboratory School

Table 3. Optional Retirement Plan Membership.

| System | Member Count | Total Payroll | Employer Contribution |
|-------------------------|--------------|----------------------|-----------------------|
| Board of Regents | 56 | \$4,488,942 | \$1,185,081 |
| LSU System ¹ | 3,695 | \$363,816,480 | \$96,047,671 |
| SU System ² | 218 | \$20,376,185 | \$5,379,314 |
| UL System | 2,463 | \$191,359,935 | \$50,519,094 |
| LCTC System | 490 | \$29,168,607 | \$7,700,513 |
| Total | 6,922 | \$609,210,149 | \$160,831,673 |

Source: TRSL, 2024

1 – LSU System includes University Laboratory School, Health Care Services Division, and Lallie Kemp

2 – SU System includes Southern Laboratory School

As a result of Act 109 of the 2024 Regular Legislative Session, ORP members have the option to switch to the DB plan within TRSL. Since the law was enacted on June 30, 2024, TRSL has received 795 applications (as of December 31, 2024) from ORP members to join the DB plan.

Recommendations

Over the course of its meetings, the Task Force discussed numerous recommendations and how each could impact employees who select ORP as well as employers. Based on the discussion and Task Force consensus, the TRSL and ORP Task Force offers the following recommendations to the House Committee on Retirement:

- **Provide ORP eligibility to certain employees within the Louisiana Community and Technical College System.**
 - Based on statutory language and TRSL interpretation of the law, employees of certain postsecondary institutions are unable to participate in ORP because the ORP law mentions “public institutions of higher education.” Some member institutions of LCTCS, including Central Louisiana Technical Community College, L. E. Fletcher Technical Community College, Northshore Technical Community College, Northwest Louisiana Technical Community College and SOWELA Technical Community College, are identified in law as “postsecondary institutions.”
 - This recommendation can be implemented through a legislative instrument to add “postsecondary institutions” to R.S. 11:921 and 925. In addition to that language revision, the systems named in the current law may be updated to reflect the four management boards that currently exist, along with the Board of Regents.
- **Increase the irrevocable decision timeframe, currently five years (Act 109 of the 2024 Regular Legislative Session), to seven years, to align with tenure decisions.**
 - Faculty who are newly hired in tenure-track positions educate students, produce research, and provide service; together these activities form the basis for promotion and the awarding of tenure. Based on the standard process, faculty typically know around the sixth year of employment whether they will be awarded tenure or not.
 - By increasing the decision timeframe from five years to seven years, faculty enrolled in the ORP plans will be able to decide on their future benefit based on their potential for promotion and tenure.
 - While this recommendation stems from a need to align retirement options to tenure decisions for faculty, this new proposed timeframe would be available to all ORP-eligible positions.
- **ORP membership participation in TRSL Board.**
 - During Task Force meetings, ORP members stated that there is no representation on the TRSL Board that directly advocates for them since they are ineligible for TRSL membership and cannot vote in board elections. As discussed during the meetings, since the implementation of the ORP in 1990 there has been no representation of ORP members on the TRSL Board.
 - Recommendation 1: Creation of an advisory committee of nine ORP members to provide information and feedback to the TRSL Board related to ORP terms, vendor selection, administrative fees, and investments, as well as regular updates to the ORP membership.
 - The advisory committee would include two members from each system (one faculty and one unclassified staff) selected by each of the system presidents and one member selected by the Commissioner of Higher Education to represent ORP members not employed by a college/university system.

- Recommendation 2: Through a legislative instrument, add a member to the TRSL Board who would be elected by active ORP members.
 - This member would have the same responsibilities, including fiduciary duties, as current members.
- **Increase employer contributions to ORP accounts.**
 - Since FY18, the employer contribution to the ORP account has been 6.2% of the employee's pay, based on R.S.11:927. A historical table of ORP rates is provided in Appendix F.
 - Based on information provided by NASRA during the September meeting, Louisiana ranks among the lowest of Southern states in employer contributions to ORP accounts. Notably, Louisiana is the only Southern state that does not contribute to Social Security, further highlighting the state's lag in retirement benefits for employees.
 - Recommendation 1: To ensure equitable and competitive retirement benefits for Louisiana's public employees, it is strongly recommended to amend Louisiana Revised Statute 11:927 to 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 1 of the 2024 Third Extraordinary Session, to be voted on in March 2025 by the state populus, 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 any savings that are recognized (\$73M estimated presently) remain in the higher education budget and a portion of these savings be used by institutions to increase employer contributions to ORP accounts, making Louisiana more competitive among Southern states.
- **Request a legislative study of a phased retirement program.**
 - Institutions across the country offer faculty the ability to retire over time by decreasing workload. Task Force discussion focused on benefits such as institutional knowledge that would remain on campus for a period of time and junior faculty retention that could be achieved through potential promotions. In addition, this program may result in savings to the institutions since senior faculty typically have higher salaries than junior faculty even after promotions occur.
 - The recommendation suggests convening a group to study the feasibility of such a program in Louisiana, through which ORP and DB members who are full-time faculty could transition into full retirement while continuing to provide service to the institution/ office.
 - The study should include the following representatives:
 - A human resources representative from each system
 - The chief financial officer, or designee, from each system
 - A faculty representative from each system
 - An academic affairs representative from each system
 - TRSL staff
 - An actuary from the Legislative Auditor's Office

- The group would consider the following areas within the request:
 - The structure of programs in other states
 - Eligibility requirements of a program in Louisiana
 - The time period for phased retirement
 - Salary and retirement benefits to be received during phased retirement
- **Revise TRSL membership eligibility for new hires to make joining TRSL optional under certain conditions.**
 - Currently, employees hired within a TRSL-eligible entity have the option only to select the DB plan or ORP.
 - The recommendation is to allow newly hired employees the option to participate in the retirement system. Optional membership would only be available to newly hired employees who are 60 or older at the time of employment or those 55 or older who have credit for at least 40 quarters in Social Security.
 - TRSL options would match the current statute (R.S. 11:44(7)(a)) for LASERS-eligible employees.
 - Employees who elect not to participate in TRSL would contribute to Social Security.
 - This eligibility would not apply to rehired retirees.

Conclusion

HR 169 of the 2024 Regular Legislative Session created the ORP Task Force, which has spent five months reviewing state and national data to illuminate and investigate the retirement-related challenges that Louisiana's public postsecondary institutions face in recruiting and retaining faculty and unclassified staff in a national market. Through a collaborative effort of the four systems, TRSL, and Regents, this report provides recommendations that can be implemented through rules, policies, and legislation.

Appendix A

HR 169

ENROLLED

2024 Regular Session

HOUSE RESOLUTION NO. 169

BY REPRESENTATIVE BACALA

A RESOLUTION

To establish a task force to study the Optional Retirement Plan within the Teachers' Retirement System of Louisiana in relation to the unclassified staff and faculty recruitment and retention crisis faced by Louisiana's public postsecondary education institutions and to report its findings to the House Committee on Retirement not later than ninety days prior to the convening of the 2025 Regular Session of the Legislature.

WHEREAS, higher education is facing a recruitment and retention crisis, and state public higher education officials have informed the legislature that current retirement options are limited and do not provide a flexible choice for unclassified staff and faculty and that a more flexible retirement option is needed to make Louisiana's public higher education institutions more competitive with other states, especially when seeking to retain or recruit individuals from among the limited pool within certain highly specialized disciplines; and

WHEREAS, the Legislature of Louisiana appreciates the leadership role of Louisiana public higher education institutions in accommodating Louisiana workforce needs through their programs and recognizes that because those programs often rely on industry-experienced faculty and staff; and

WHEREAS, the Legislature created the Optional Retirement Plan (ORP), a defined contribution plan within the Teachers' Retirement System of Louisiana (TRS); the traditional TRS plan is a defined benefit plan with a guaranteed pension, but the ORP is a defined contribution plan without a guaranteed pension, making the ORP unique among the plans available to public employees in Louisiana; and

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WHEREAS, a participant in the defined contribution plan assumes all risk associated with the investment of his or her contributions and is not guaranteed a pension upon retirement or upon termination of employment prior to retirement, but rather, their individual retirement benefits are based on the value of the account at the time of the individual's retirement and solvency of the carrier; and

WHEREAS, TRSL participants have a lifetime benefit guaranteed by the state of Louisiana; ORP participants have no lifetime guarantee; eligible TRSL participants receive disability and survivor benefits; ORP participants do not receive disability or survivor benefits other than the value of their ORP account at the time of disability or death; and

WHEREAS, the ORP is within the Teachers' Retirement System of Louisiana, which has a board to represent interests of TRSL members; there is neither a board to represent interests of ORP participants nor a seat dedicated to ORP participants on the TRSL board; and

WHEREAS, although ORP participants do not receive a defined retirement pension, they are nevertheless subject to a reduction or elimination of any earned Social Security benefits through the Windfall Elimination Provisions and the Government Pension Offset; and

WHEREAS, the House of Representatives needs comprehensive, objective information on these and other aspects of the ORP to make informed decisions about possible adjustments to the laws providing for it.

THEREFORE, BE IT RESOLVED that the House of Representatives of the Legislature of Louisiana does hereby establish a task force to study the Optional Retirement Plan within the Teachers' Retirement System of Louisiana in relation to the unclassified staff and faculty recruitment and retention crisis faced by Louisiana's public postsecondary education institutions and to report its findings to the House Committee on Retirement not later than ninety days prior to the convening of the 2025 Regular Session of the Legislature.

BE IT FURTHER RESOLVED that the task force hereby established shall examine aspects of the ORP program, including but not limited to:

- (1) Provide ORP providers an opportunity to share industry best practices on individual savings and plan design.
- (2) How nonpension retirement plans are managed in other states.

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ENROLLED

- (3) Advantages and disadvantages associated with selection of the ORP.
- (4) Information about what other states offer to their respective public postsecondary employees.
- (5) The feasibility of allowing a participant in ORP to change their decision to participate in the ORP.
- (6) Employer contribution rates for the defined benefit pension plans and ORP and the benefits accrued to the members.
- (7) Differences, if any, in the definitions of "higher education" and "postsecondary education" as these terms are used in laws establishing institutions and interpreted by TRSL in the administration of retirement plans.
- (8) Other issues the task force believes the legislature should be aware of.

BE IT FURTHER RESOLVED that the task force shall be comprised of fifteen members appointed as follows:

- (1) The Board of Supervisors for the University of Louisiana System shall appoint three members, at least two of whom shall be Optional Retirement Plan participants and one of those shall be a faculty member in a hard-to-recruit research, scientific, or medical discipline.
- (2) The Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall appoint three members, at least two of whom shall be Optional Retirement Plan participants and one of those shall be a faculty member in a hard-to-recruit research, scientific, or medical discipline.
- (3) The Board of Supervisors of Southern University and Agricultural and Mechanical College shall appoint three members, at least two of whom shall be Optional Retirement Plan participants and one of those shall be a faculty member in a hard-to-recruit research, scientific, or medical discipline.
- (4) The Board of Supervisors of Community and Technical Colleges shall appoint two members, at least one of whom shall be an Optional Retirement Plan participant.
- (5) The Board of Regents shall appoint two members, at least one of whom shall be an Optional Retirement Plan participant.
- (6) The board of trustees of the Teachers' Retirement System of Louisiana shall appoint two members, at least one of whom shall be an Optional Retirement Plan participant.

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(7) The actuary for the legislative auditor shall serve as an ex-officio member.

BE IT FURTHER RESOLVED that the appointing authorities shall submit the names and contact information for their appointees, no later than July 1, 2024, to the commissioner of higher education, who shall call the first meeting of the task force no later than August 1, 2024.

BE IT FURTHER RESOLVED that at the first meeting, the members of the task force shall elect a chair and such other officers as it deems necessary; the chair shall call subsequent meetings.

BE IT FURTHER RESOLVED that the Board of Regents shall provide staff for the task force, the Legislative Auditor shall provide actuarial services requested by any member of the task force for any aspects discussed, and task force members shall serve without compensation and without reimbursement of expenses associated with participation or travel except that which they are entitled to from their employers.

SPEAKER OF THE HOUSE OF REPRESENTATIVES

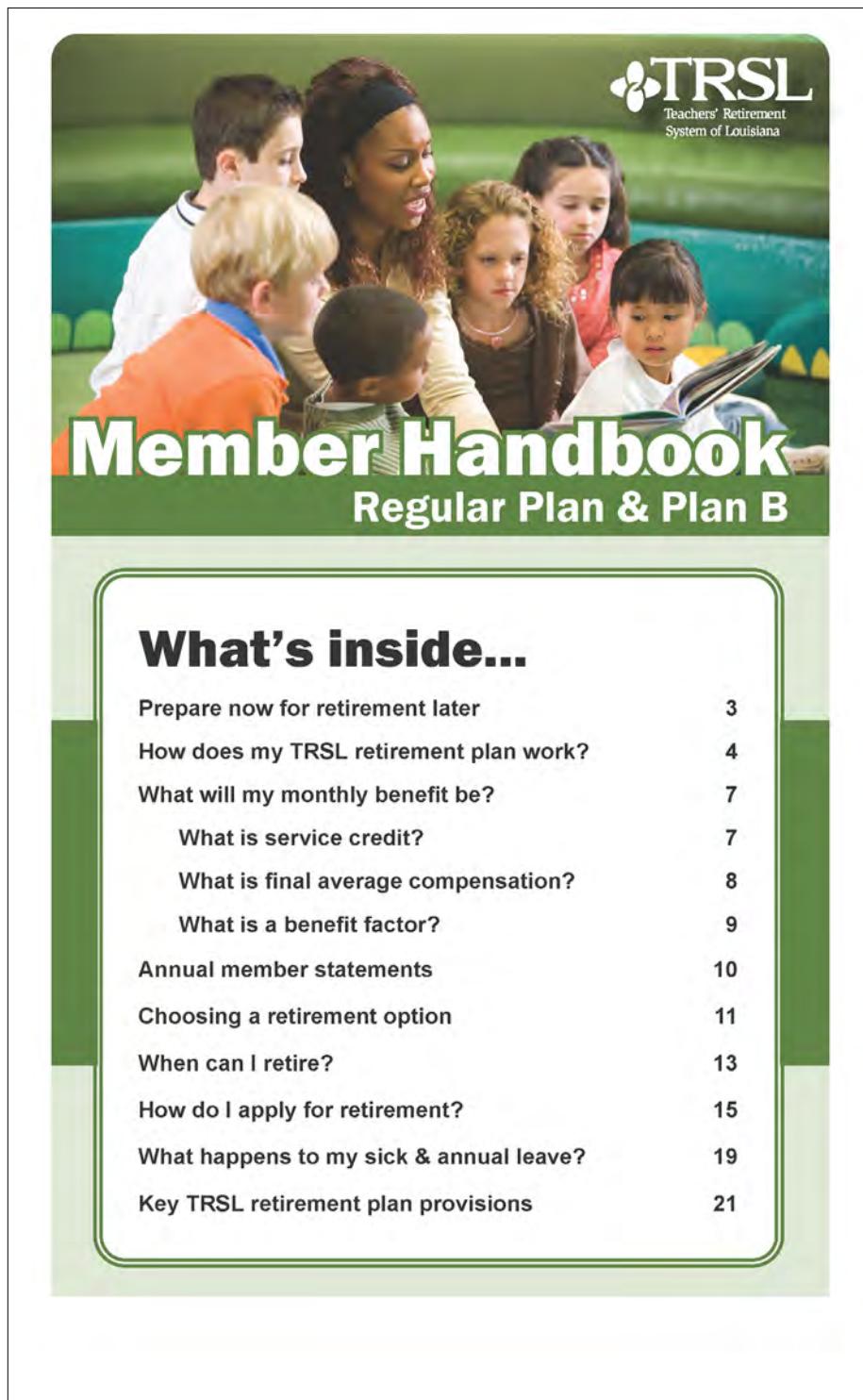
Appendix B

Task Force Roster

| Member | Seat Information |
|-------------------------|--|
| Dr. Philip Auter | University of Louisiana System |
| Dr. Vassil Roussev | University of Louisiana System |
| Dr. Erin Horzelski | University of Louisiana System |
| Dr. Keena Arbuthnot | Louisiana State University System |
| Sheantel Baker | Louisiana State University System |
| Dr. Parampreet Singh | Louisiana State University System |
| Dr. Cynthia Bryant | Southern University System |
| Dr. Edward Doomes | Southern University System |
| Dr. Luria Young | Southern University System |
| Gena Doucet | Louisiana Community and Technical College System |
| Jeffery "Jeff" Fleming | Louisiana Community and Technical College System |
| Matthew LaBruyere | Board of Regents |
| Carrie Robison | Board of Regents |
| Dr. Jason Fountain | Teacher's Retirement System of Louisiana |
| Kenneth "Trey" Roche | Teacher's Retirement System of Louisiana |
| Kenneth "Kenny" Herbold | Louisiana Legislative Auditor |

Appendix C

TRSL Member Handbook



Member Handbook
Regular Plan & Plan B

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Prepare NOW for retirement LATER:

Register for Member Access

- TRSL's secure online Member Access allows you to view and update your account information.
- If you haven't registered for Member Access, visit www.TRSL.org and follow the easy registration instructions.

Working members

- View annual statements
- Estimate your benefit with calculators that load your account information
- Update name, mailing address, and email address
- Apply for retirement

Retired members

- View benefit history
- View and print 1099-R
- Update email address
- Print income verification letter
- Request Social Security verification letter.

Keep your personal information current

- **Name change:** *Active Member Name Change Request* (Form 2NC)
- **Address Change:** *Change of Address Authorization* (Form 2AC)

Keep your beneficiary information current

- **Active members:** *Beneficiary Designation for Non-Retired Members* (Form 3)
- **Option 1 retirees:** *Change of Beneficiary for Option 1 Retiree* (Form 3A)

Submit required documents

- Submit birth certificates, Social Security cards, and the divorce documents requested on page 15 now, so we'll already have them when you're ready to retire.

Register for a TRSL workshop or webinar

- Register at www.TRSL.org and get your questions answered.

Find more online @ www.TRSL.org

- Find information, brochures, and forms to guide you through the process.
- **ASK TRSL:** www.TRSL.org/ask_TRSL
- **Facebook:** *Teachers' Retirement System of Louisiana*
- **Twitter:** [@TRSLOnline](https://twitter.com/TRSLOnline)
- **YouTube:** [TRSLOnline](https://www.youtube.com/teachersretirement)

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How does my TRSL retirement plan work?

You have a defined benefit retirement plan, often called a pension.

Your TRSL benefit is paid to you for your entire life, and is calculated using three factors:

1. your years of TRSL service credit,
2. your final average compensation (FAC), and
3. a benefit factor (2.0% or 2.5%).

These three factors, multiplied together, total the maximum TRSL benefit that you are eligible to receive.

Your retirement income from TRSL is based on these factors, not on how much you contribute to your retirement or the balance in a retirement account.

How is my retirement funded?

Your retirement is funded by a percentage of your salary and contributions from your employer. Employee and employer contributions are transferred to TRSL and maintained in a trust fund. TRSL pools and invests the contributions. These contributions and the interest earned on TRSL investments pay for your future lifetime retirement benefits.

Most TRSL members do not participate in Social Security, which often makes TRSL their primary source of retirement income.

How much do I contribute to my TRSL retirement?

TRSL administers two retirement plans. Employee contribution rates for each plan are as follows:

- **REGULAR PLAN** – 8.0% of salary
- **PLAN B** – 5.0% of salary (also participates in Social Security)

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What TRSL retirement plan am I in?

The plan you are in is determined by your position (and sometimes, where you are employed). Most TRSL members belong to the Regular Plan.

REGULAR PLAN includes most TRSL members, including teachers, administrators, etc.

PLAN B includes school food service employees in the following parishes: Allen, Assumption, Avoyelles, Cameron, Catahoula, Concordia, DeSoto, East Feliciana, Jefferson, Jefferson Davis, Lafayette, LaSalle, Morehouse, Orleans, Red River, St. Helena, St. John the Baptist, St. Mary, Washington, and West Feliciana. These members also participate in Social Security.

Each plan has slight differences in retirement eligibility requirements, employee contribution rates, and benefit computation methods.

Unsure which plan you're in? Log into your Member Access account through our website. If you aren't registered for Member Access, visit www.TRSL.org and click on the Member Access link. Follow the easy instructions to complete a one-time registration.

NOTE: Since 1983, another retirement plan administered by TRSL (School Lunch Plan A) has been closed and has stopped enrolling new members. Please contact TRSL for information about Plan A.

TRSL membership

If you become employed in a position which would normally require you to enroll in another Louisiana public retirement system, you may be eligible to remain in TRSL. Under state law, you can elect to retain membership in TRSL if you meet all of these criteria:

- You have a minimum of five years of TRSL service credit.
- Your new position is with a Louisiana public agency and is not covered by the Parochial Employees' Retirement System of Louisiana or the Clerks' of Court Retirement and Relief Fund.

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If you decide to remain in TRSL instead of joining another retirement system, you must make an irrevocable election to retain your TRSL membership by completing and submitting to TRSL an *Election to Retain Membership* (Form 2R) within 60 days of your new employment.

Why retain TRSL membership?

Retaining membership means that you will continue to accrue service credit toward retirement eligibility with your same retirement system. If you join another retirement system instead of retaining membership in TRSL, you will become a new member of that system.

All of your years in TRSL will not count toward retirement eligibility or benefits unless you actuarially transfer your service credit to your new retirement system or establish a reciprocal recognition of service credit between both systems.

If you are considering changing positions, which would make you eligible for membership in another Louisiana public retirement system, we urge you to contact TRSL. You may be eligible to retain your TRSL membership if you meet the criteria listed on page 5.

Optional programs

Several optional programs are available that can help you attain your financial goals:

- Deferred Retirement Option Plan (DROP)
- Initial Lump-Sum Benefit (ILSB)
- **Optional Retirement Plan (ORP) — for unclassified employees in higher education**

It is important to review these programs to see if they are right for you and whether you meet eligibility requirements. For more information, visit www.TRSL.org.



Were you an ORP participant?

If you have service credit in the defined benefit plan that was earned prior to joining the Optional Retirement Plan (ORP), that service credit can only be used to calculate your benefit. Generally, pre-ORP service credit does not count toward eligibility for retirement, disability, or survivor benefits. ORP participation time does not count toward service credit in the defined benefit plan and cannot be purchased.

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What will my monthly retirement benefit be?

Your lifetime retirement benefit is calculated using a formula set by state law. This formula calculates the maximum monthly retirement benefit for which you are eligible, and is based upon three factors: (1) your TRSL service credit, (2) final average compensation (FAC), and (3) a benefit factor of 2.0% or 2.5%.

| BENEFIT FORMULA | EXAMPLE |
|---|--|
| Years of Service Credit x Final Average Compensation (FAC) x Benefit Factor (2.0% or 2.5%) = Maximum Retirement Benefit | 30 Years x \$58,000 FAC x 2.5% Benefit Factor = \$43,500 (\$3,625/month) |

What is service credit?

Service credit is the amount of time you work and contribute to TRSL. It can also include any of your unused sick and/or annual leave. TRSL converts your unused sick and/or annual leave to service credit at the time you retire. These types of leave cannot be used to attain eligibility for retirement.

How does TRSL use service credit?

TRSL uses service credit for two purposes: (1) to determine when you are eligible to retire, and (2) to calculate your retirement benefit.

For many members, the amount of service credit they have for retirement eligibility and benefit computation is the same. For some, however, the amounts may be different. This can happen when a member works part-time or takes sabbatical leave.

You can see how much service credit you have for retirement eligibility and benefit computation purposes by reviewing your TRSL account online through Member Access at www.TRSL.org.

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How do I earn service credit?

- You earn one year of service credit for each full year worked.
- You cannot earn more than one year of service credit in a 12-month period that begins July 1 and ends June 30.
- If you do not work a full year, your service credit for that year will likely be based on a percentage of the actual salary paid to you, divided by what you would have earned if you had worked the full year.
- In most cases, if you go on leave without pay (LWOP), you will not earn a full year of service credit.
- You can increase your service credit through a purchase, transfer, or reciprocal recognition agreement. For more information about purchasing service credit, see our handbook *Purchases and Transfers of Service Credit*, available at www.TRSL.org.

What if I work part time?

Members with part-time or sabbatical service credit may receive full credit for retirement eligibility purposes, but only partial service credit for benefit computation purposes. These members may find they are eligible for retirement or DROP participation earlier than expected, but their benefits may be less than anticipated.

Members with part-time service or sabbatical leave (especially those nearing retirement or DROP participation eligibility) should contact TRSL to have their records verified.

What is final average compensation (FAC)?

The FAC is the average of your highest years of salary consecutively earned. TRSL looks at your entire salary history to find the three or five years of highest consecutive earnings to calculate your FAC, based upon when you first became a member of one of Louisiana's four state public retirement systems: TRSL, State Employees, School Employees, or State Police.

- **Three-year FAC:** Used for individuals who first joined one of the four state retirement systems *prior to* January 1, 2011
- **Five-year FAC:** Used for individuals who first joined one of the four state retirement systems *on or after* January 1, 2011

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State law places a 10% or 15% salary cap in each of the years used to determine your FAC.

- **10% salary cap:** Used for individuals who first joined one of the four state retirement systems *prior to* January 1, 2011
- **15% salary cap:** Used for individuals who first joined one of the four state retirement systems *on or after* January 1, 2011

The salary cap does not apply when the cap is exceeded solely because of a legislative act or a system-wide raise for cities, parishes, and colleges or universities.

To test for a cap on salary increases in the first year of earnings, TRSL requires a base year of salary. The base year is the year immediately preceding your three or five highest years of salary consecutively earned.

NOTE: There is also a 25% limit on salary increases for the 12 months during which a classroom teacher changes employment to that of a classroom teacher in another parish.

Does overtime count toward my FAC?

Yes, it does. Overtime is considered a part of your salary for retirement purposes. This includes differential pay, contract pay, and grants paid to a TRSL member, unless those earnings are received because of employment normally eligible for a different retirement system.

What is a benefit factor?

This is a percentage used to calculate your retirement benefit. Your retirement plan and the date you joined TRSL determine which benefit factor will be used to compute your retirement benefit.

| Retirement Plan | Benefit Factor |
|--|----------------|
| Regular Plan: Joined <i>prior to</i> July 1, 1999* | 2.0% or 2.5% |
| Regular Plan: Joined <i>on or after</i> July 1, 1999 | 2.5% |
| Plan B | 2.0% |

*For Regular Plan members who joined TRSL prior to July 1, 1999, the benefit factor (2.0% or 2.5%) is determined by age and years of service.

NOTE: DROP/ILSB benefit factors and eligibility may differ. See our DROP Handbook and ILSB brochure for more information.

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Annual member statements

Member statements detail the salaries, contributions, and service credit reported by your employer(s) for each fiscal year, in addition to your accumulated funds and total service credit. Members with at least five years of TRSL service credit will also see a retirement benefit estimate based upon employment information on record.

Annual member statements are available in August through TRSL's secure online Member Access.

Carefully check all of the information on your statement, including your home address and designated beneficiary.

What do I do if my member statement is incorrect?

An uncorrected error could affect your future retirement benefit. If you believe the information on your statement is inaccurate, contact your employer and ask them to submit corrections to TRSL.

- Your employer has three years to correct any errors in salary reported to TRSL by paying the correct amount of employee and employer contributions plus interest. So it's important to *notify them as soon as you notice any discrepancies* in salary, service credit, or contributions.
- For any corrections to earnings or salary made more than three years after a contribution report is due, TRSL will require that the actuarial cost of the service credit be paid by the responsible parties (which may include you and/or your employer).

Feel free to contact TRSL about any problem that cannot be resolved by your employer.

Appeals

You can file an appeal if you feel your rights under state law and/or the policies of TRSL have been violated. It is the duty of the TRSL Board of Trustees to hear such appeals and issue timely written decisions in these cases. Appeals can be made in writing to:

TRSL Board of Trustees
P.O. Box 94123
Baton Rouge, LA 70804-9123

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Choosing a retirement option

Once you've calculated the maximum retirement benefit to which you are eligible, you will need to decide how much you and your beneficiary (if you choose) will receive each month. This is done by selecting a retirement option.

When you enter DROP or retire, you will select, on a notarized affidavit, one retirement option from among eight different options. The following tables list each retirement option and the benefit information for you and your beneficiary(ies).

| Retirement Option | Member Benefit | Beneficiary Benefit |
|------------------------|---|---------------------|
| Maximum Option* | Member receives largest monthly benefit possible. | None |

*All monthly benefits cease at member's death. Only the amount of member contributions that have not been paid out in monthly benefits or in DROP deposits and interest is due the member's estate.

| | | |
|------------------|---|--|
| Option 1* | Member receives a monthly benefit slightly less than Maximum Option. Age at retirement is one factor upon which the reduction is based. | More than one beneficiary can be designated, and member/retiree can change it at any time. |
|------------------|---|--|

*Beneficiary receives remaining balance of member's contributions (if any) in one lump-sum payment. Option 1 cannot be selected if member participates in Initial Lump-Sum Benefit (ILSB).

Under the next six benefit options, only one beneficiary can be named and that beneficiary can never be changed, even if the beneficiary dies before the member. These options provide a retirement benefit that is actuarially reduced from the Maximum Option benefit. Reductions are based on your age at retirement and the age of your named beneficiary.

Designated beneficiaries of retirees receive a retirement benefit from TRSL based upon the retirement option chosen by the retiree at the time he or she retired or entered DROP. (*If the designated beneficiary of a retiree is someone other than the spouse, the election of the retirement beneficiary will be voided if there are minor children.*)

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| Retirement Option | Member Benefit | Beneficiary Benefit |
|--------------------------------|---|--|
| Option 2 | Member receives an actuarially reduced monthly benefit. | Beneficiary receives same lifetime benefit member received. |
| Option 2A (Pop Up)* | Member receives a monthly benefit slightly less than Option 2. | Beneficiary receives same lifetime benefit member received. |
| Option 3 | Member receives a monthly benefit greater than Option 2 or 2A benefit. | Beneficiary receives lifetime benefit equal to $\frac{1}{2}$ of benefit amount member received. |
| Option 3A (Pop Up)* | Member receives a monthly benefit greater than Option 2 or 2A benefit but less than Option 3 benefit. | Beneficiary receives lifetime benefit equal to $\frac{1}{2}$ of benefit amount member received. |
| Option 4 | Member receives a reduced monthly benefit based upon amount member designates for beneficiary. | Beneficiary receives lifetime benefit designated by member, not to exceed the Option 2 benefit amount. |
| Option 4A (Pop Up)* | Member receives a reduced monthly benefit based upon amount member designates for beneficiary. | Beneficiary receives lifetime benefit designated by member, but not to exceed the Option 2 benefit amount. |

**If beneficiary dies before member, the member's benefit "pops up" to Maximum Option. However, a new beneficiary cannot be named.*

Annual COLA Option (ACO): An additional retirement option provides a retiring member a self-funded, guaranteed annual 2.5% cost-of-living adjustment (COLA) by accepting an actuarially reduced retirement benefit. For more information, see our brochure *Annual COLA Option (ACO)* at www.TRSL.org.

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When can I retire?

TRSL members must meet certain age and service credit requirements to retire. Eligibility requirements are based upon the plan you are in and when you first became a member of one of Louisiana's four state public retirement systems: TRSL, State Employees, School Employees, or State Police.

DROP/ILSB benefit factors and eligibility may differ. Please see TRSL's *DROP Handbook* and *ILSB brochure* for more information.

REGULAR PLAN: Retirement eligibility

In the TRSL Regular Plan, eligibility for retirement is determined by the date you joined TRSL. Refer to the membership dates below to find the retirement eligibility criteria that apply to you.

| Membership prior to July 1, 1999 | |
|--|--|
| 2.0% benefit factor | <ul style="list-style-type: none">At least age 60 with at least 5 years of service credit*, orAny age with at least 20 years of service credit* |
| 2.5% benefit factor | <ul style="list-style-type: none">At least age 65 with at least 20 years of service credit**, orAt least age 55 with at least 25 years of service credit, orAny age with at least 30 years of service credit |
| Membership between July 1, 1999 - December 31, 2010 | |
| 2.5% benefit factor | <ul style="list-style-type: none">At least age 60 with at least 5 years of service credit*, orAt least age 55 with at least 25 years of service credit, orAny age with at least 20 years of service credit* (actuarially reduced), orAny age with at least 30 years of service credit |
| Membership between January 1, 2011 - June 30, 2015 | |
| 2.5% benefit factor | <ul style="list-style-type: none">At least age 60 with at least 5 years of service credit*, orAny age with at least 20 years of service credit* (actuarially reduced) |
| Membership on or after July 1, 2015 | |
| 2.5% benefit factor | <ul style="list-style-type: none">At least age 62 with at least 5 years of service credit*, orAny age with at least 20 years of service credit* (actuarially reduced) |

*Excludes military service purchased after September 10, 1982

**Excludes any military service

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What does actuarially reduced mean?

Retiring with 20 years of service credit is considered an early retirement. Therefore, the retirement benefit is reduced based upon the number of years it would have taken you to reach the next retirement eligibility criteria (regular retirement). The greater the number of years to regular retirement, the greater the actuarial reduction will be.

NOTE: Early retirement for those who joined TRSL prior to July 1, 1999, is calculated with a lower 2.0% benefit factor.

PLAN B: Retirement eligibility

Plan B includes school food service employees who work in parishes listed on page 5. Plan B members also participate in Social Security.

Retirement eligibility for Plan B is determined by the date you joined TRSL. Refer to the membership dates below to find the retirement eligibility criteria that apply to you.

Membership prior to July 1, 2015

| | |
|------------------------------------|---|
| 2.0% benefit factor | <ul style="list-style-type: none">At least age 60 with at least 5 years of service credit*, orAt least age 55 with at least 30 years of service credit |
|------------------------------------|---|

Membership on or after July 1, 2015

| | |
|------------------------------------|---|
| 2.0% benefit factor | <ul style="list-style-type: none">At least age 62 with at least 5 years of service credit*, orAny age with at least 20 years of service credit*, (actuarially reduced) |
|------------------------------------|---|

**Excludes military service purchased after September 10, 1982*

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How do I apply for retirement?

You can apply for retirement as early as six months before your desired date of retirement. Please complete all purchases, transfers, and reciprocals of service credit before your retirement date. (See our handbook, *Purchases and Transfers of Service Credit*, for more information about purchasing or transferring service credit.)

Apply online!

The easiest way to apply for retirement is online through TRSL's Member Access. If you aren't registered for Member Access, visit www.TRSL.org and follow the easy instructions.

Or complete and submit the following forms:

- *Application for Service Retirement, ILSB, or DROP (Form 11)*
-If terminating employment after DROP, complete Form 11H.
- *Direct Deposit of Benefits (Form 15D)*
- *Withholding Certificate for Periodic Pension or Annuity Payments (Form W-4P)*
-Form W-4P is not needed for the Form 11 DROP application.

Copies of other documents you'll need to submit

Please do not submit originals.

- Social Security cards (member and beneficiary/ies)
- Birth certificates (member and beneficiary/ies)
- Marriage license to current spouse
- Death certificate, if spouse is deceased
- If you have ever been divorced, attach a certified copy of all divorce judgments, judgments of termination of community property, or judgments of separation of property. Also, include a certified copy of all domestic relations orders or judgments of community partition, if applicable. If your current marital status is "divorced," an *Affidavit of Retirement Option Election (Form 11E)* will be sent to you once we receive your divorce related documents.

For a list of other acceptable records in place of a birth certificate, refer to the *Retirement Application Checklist* on the "Brochures" page of www.TRSL.org. If you meet eligibility requirements for retirement, TRSL will send you an *Affidavit of Retirement Option Election (Form 11E or Form 11E-5)* so you can select a retirement option.



REMEMBER: Write your name and full Social Security number on each document you submit to TRSL.

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TRSL recommends that you coordinate your retirement date with your employer and inform TRSL of any change before cashing or depositing a retirement benefit check. Once you cash or deposit (includes direct deposit) a benefit check, you are retired as of the effective date of the retirement application, and the retirement cannot be canceled.



When will I get my first retirement check?

By law, TRSL can issue your initial retirement payment only after a minimum 30-day waiting period from your date of retirement.

Retirement benefit payments, including estimated benefit payments, are made on the first of each month, pending completion of the minimum 30-day waiting period. TRSL generally begins paying estimated benefits after the properly executed retirement option affidavit and completed *Direct Deposit of Benefits* (Form 15D) are returned to TRSL by the payroll deadline, which is usually the third week of the month. The first retirement payment will be a paper check that will be mailed to your home address. State law requires TRSL to make subsequent payments by direct deposit. Your monthly retirement payments are based on the retirement option you choose. See pages 11-12 for information about benefit options.

EXAMPLE: If your retirement date is June 6, the benefit can be set up for the August 1 payroll as long as TRSL receives the necessary forms by the first week of July.

What is an estimated benefit payment?

Estimated benefit payments are payments you will receive from TRSL until your employer verifies all of the information TRSL needs to calculate your retirement benefit, including unused sick and annual leave. These payments are calculated based on information TRSL currently has on file, which is subject to change as determined by your employer. Until TRSL receives verification from your employer, you will receive monthly estimated benefit payments.

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When will my benefit be finalized?

TRSL will finalize your benefit once all required information is received from you and your employer(s). Until that time, you will receive an estimated benefit.

About estimated benefit payments:

- Once your benefit is finalized, TRSL will retroactively pay you additional retirement benefits due, if any, going back to your date of retirement.
- Retroactive payments are paid in the month the final benefit is calculated, prior to the finalized benefit being issued.

When will I have access to my retirement benefits made by direct deposit?

Benefits are made available for deposit directly into your checking or savings account on the first of the month. However, when the first of the month falls on a weekend or a holiday, some financial institutions post the deposit to your account the next business day.

Changing banks? To change your banking institution and/or account information, submit a new direct deposit form with your new financial institution's information. Direct deposit forms for regular retirement benefits and DROP withdrawals are available at www.TRSL.org/forms.

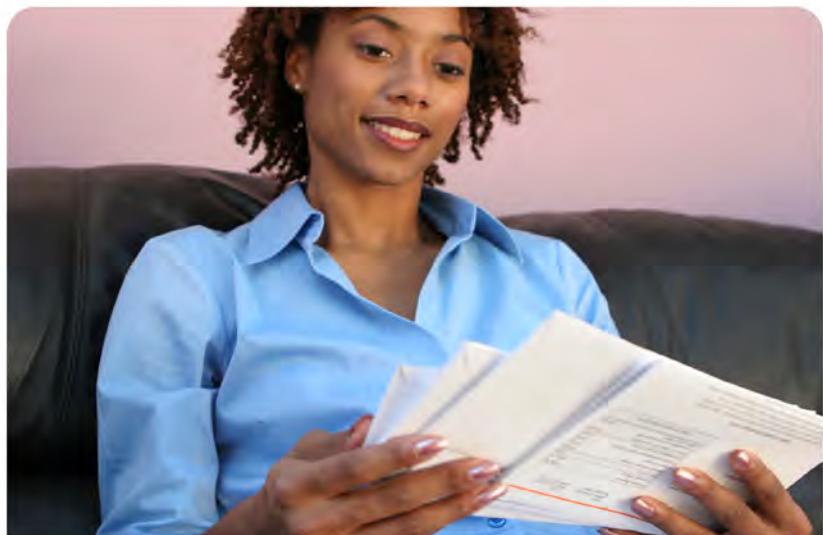
Can I cancel my retirement application?

You can cancel your retirement application by sending TRSL a signed and dated written request by mail, email, or fax.

Remember, once a retirement benefit payment has been cashed (or directly deposited), you are considered retired and cannot cancel your application or change your retirement date.

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How do I get an estimate?

You can create a benefit estimate with TRSL's retirement calculators, pre-loaded with your information. Just log into TRSL's secure Member Access to get started.

Or, complete and submit to TRSL a *Benefit Estimate Request* (Form 10), available at www.TRSL.org.

NOTE: Members with at least five years of TRSL service credit will see a retirement benefit estimate on their annual member statement. (See Page 10)

Can I go back to work after retirement?

Once you retire, reemployment in a position eligible for TRSL membership will be subject to the state's return-to-work laws. For more information, please see our brochure, *Returning to Work after Retirement* or visit www.TRSL.org/rtw.

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What happens to my sick & annual leave?

Sick leave

Sick leave is a benefit of employment, and is subject to the authority of your employing agency. However, *unused* sick leave is an important part of your retirement because it can increase your monthly benefit when converted to service credit.

TRSL converts your unused sick leave to service credit after you have submitted an official application for retirement and your final benefit is calculated. For more information, see our brochure *Sick Leave & Conversion to Service Credit* at www.TRSL.org.

What you should know about sick leave:

- Unused sick leave cannot be used to attain eligibility for retirement. Eligibility must first be attained; then unused sick leave credit is used to calculate the final amount of your retirement benefit.
- The amount of unused sick leave that can be used to compute your benefit depends on when the sick leave was earned. Different laws govern sick leave credit based on when the leave was earned:
 - » On/before June 30, 1988
 - » Between July 1, 1988 and June 30, 1990; and
 - » On/after July 1, 1990.
- The amount of sick leave that an employer allows a member to accumulate may be different from the amount state law will allow for retirement benefit computation credit.
- At its discretion, your employer may pay you up to 25 days of unused sick leave at your daily rate of pay upon retiring or entering DROP.

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Annual leave

For state employees

Employees of Louisiana state agencies, colleges, universities, community colleges, and technical colleges may receive credit for unused annual leave at no cost, if they were first eligible to retire by June 30, 1990.

The formula for computing unused annual leave is as follows: divide the annual leave days remaining by the days of the contract to determine the percentage of the year for retirement credit.

Unused annual leave can be converted to service credit for use in computing your retirement benefit; it cannot be used to attain retirement eligibility.

What you should know about annual leave:

- Members who were first eligible to retire after June 30, 1990, can convert unused annual leave earned after that date to service credit by purchasing the leave at actuarial cost.
- For a member to obtain credit for unused annual leave, TRSL must receive official certification of the member's accrued annual leave for which an attendance record was maintained by the employer.
- Members who earn annual leave (usually 12-month employees) are usually paid for 300 hours or 37.5 days of annual leave by their employers upon termination of employment. The number of days for which a member is paid is deducted from the number of days certified as unused by the employer.

For school board employees

Employees of school boards are eligible to receive credit for unused annual leave if it is purchased at actuarial cost. This leave must have accrued under established leave regulations, and an employee attendance record must have been maintained by the employer.

School board employees are eligible to purchase unused annual leave for which they are not entitled to payment.

At its discretion, the employer can pay up to 50% of the purchase price to convert unused annual leave to service credit. However, if the employer makes such a payment for one employee, it must do the same for all employees.

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TRSL Member Handbook

REGULAR PLAN

KEY PLAN PROVISIONS

| | |
|--------------------------------------|--|
| Membership | Most TRSL members are in the Regular Plan which includes those employed in any of the classifications defined by law as a "teacher." |
| Contribution Rate | 8.0% of salary |
| Retirement Eligibility (see page 13) | <p>There are different eligibility requirements for members who joined TRSL:</p> <ul style="list-style-type: none">• prior to July 1, 1999;• between July 1, 1999 - December 31, 2010;• between January 1, 2011 - June 30, 2015; and• on or after July 1, 2015. |
| Benefit Formula (see page 7) | Years of service × final average compensation (FAC) × benefit factor (2.0% or 2.5%) |
| Disability Retirement | Members can apply for disability retirement if they acquire a permanent disability while actively employed and meet all eligibility requirements. See our <i>TRSL Disability Retirement</i> handbook for more information. |
| Survivor Benefit | The spouse and minor children of a member may be eligible for survivor benefits if the member dies while actively employed and had at least five years of TRSL service credit. See our handbook, <i>Death and Survivor Benefits</i> . |

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| PLAN B | |
|--------------------------------------|--|
| KEY PLAN PROVISIONS | |
| Membership | Includes school food service employees who work in the 20 parishes that have not withdrawn from Social Security coverage. See page 5 for a list of Plan B parishes. |
| Contribution Rate | 5.0% of salary. <i>NOTE: Plan B members also contribute to the old-age portion of Social Security and become eligible for unreduced Social Security benefits when reaching the required age for Social Security retirement.</i> |
| Retirement Eligibility (see page 14) | There are different eligibility requirements for members who joined TRSL: <ul style="list-style-type: none">• prior to July 1, 2015• on or after July 1, 2015. |
| Benefit Formula | Years of service × final average compensation (FAC) × 2.0% benefit factor |
| Disability Retirement | Members can apply for disability retirement if they acquire a permanent disability while actively employed and meet all eligibility requirements. See our <i>TRSL Disability Retirement</i> handbook for more information. |
| Survivor Benefit | The spouse of a member may be eligible to receive survivor benefits if the member dies while actively employed and had at least 20 years of TRSL service credit. Social Security pays minor child benefits. See our handbook, <i>Death and Survivor Benefits</i> . |

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Questions about
your retirement?

We're here to help!

Physical address:
8401 United Plaza Blvd, Ste 300
Baton Rouge LA 70809-7017

Mailing address:
PO Box 94123
Baton Rouge LA 70804-9123

Telephone: 225-925-6446
Toll free (outside Baton Rouge area):
1-877-ASK-TRSL (1-877-275-8775)

Questions: www.AskTRSL.org
Web: www.TRSL.org

Facebook | X | YouTube
@TRSLonline

LinkedIn:
Teachers' Retirement System
of Louisiana



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ORP Handbook



TRSL
Teachers' Retirement
System of Louisiana

Optional Retirement Plan

Includes a comparison of TRSL and the ORP

What's Inside

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ORP Handbook

What is the ORP?

The ORP (Optional Retirement Plan) is a defined contribution plan, under Internal Revenue Code §401(a), in which account holders direct their own investments through private carriers.

This alternative plan is available to academic and unclassified employees of Louisiana colleges, universities, community colleges and constitutionally established boards that manage institutions of higher education.

After joining the ORP, a participant can make a one-time choice to enroll in the TRSL defined benefit plan. The windows for making this decision are set by state law.

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Am I eligible?

Academic and unclassified employees of Louisiana colleges, universities, and community colleges can participate in the ORP. The ORP is also available to employees of the following boards:

- Board of Regents
- Board of Supervisors for the University of Louisiana System
- Board of Supervisors for the Louisiana State University and Agricultural and Mechanical College
- Board of Supervisors of Southern University and Agricultural and Mechanical College
- Board of Supervisors for the Louisiana Community and Technical College System
- Any other constitutionally established board that manages institutions of higher education

Who are the current ORP carriers?

| Current ORP carriers: | Carrier websites |
|--|---|
|  Voya Life Insurance & Annuity Company | https://trsl.beready2retire.com/ |
|  Teachers Insurance and Annuity Association | www.tiaa.org/louisianaorp |
|  Corebridge Financial | https://corebridgefinancial.com/rs/trsl |



ORP participants can change carriers at anytime by submitting the *Application for Optional Retirement Plan or Change of Carrier* (Form 16).

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How do I join the ORP?

If you decide to enroll in the ORP, you will need to complete TRSL's *Application for Optional Retirement Plan or Change of Carrier* (Form 16). Eligible employees can enroll in the ORP at any point before earning five years of TRSL service credit.

- If the election is made within 60 days of employment, both employee and employer contributions transfer to the ORP account.
- If the election is made after 60 days but before earning five years of TRSL service credit, only employee contributions transfer to the ORP account.

How does the ORP work?

An ORP account is owned by the participant, and there is no waiting period to join the plan. ORP participants are 100% vested from the date of enrollment.

The ORP participant selects which ORP carrier to invest with. Employer and employee contributions are invested by the designated ORP carrier in the investment options chosen by the participant.

The performance of the participant's investments determines the retirement benefit due. ORP carriers provide projections of possible (not guaranteed) benefits.

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ORP Handbook



How are contributions credited?

The employee's contribution is 8.0% of salary, less a 0.05% administrative fee to TRSL. The employer contribution is determined by employer type.

Higher education employers:

The employer contribution rate is 6.2%. However, higher education boards created by Article VIII of the Louisiana Constitution can establish a rate above 6.2% by board resolution.

NOTE: Any rate established by board resolution is applicable to each board's employees and the employees of each institution and agency under its supervision and control, including laboratory schools.

Non-higher education employers:

The employer contribution rate is 6.2%.

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What are my retirement options under the ORP?

An ORP participant can choose to retire and receive benefits at any time after termination of all employment in public education in Louisiana. At a participant's death, the ORP account is payable to the beneficiary(ies) in a lump sum or as an annuity. Benefits payable to ORP participants or their beneficiaries are the sole liability and responsibility of the ORP carrier.

| Payment options for ORP balances* | |
|-----------------------------------|--|
| Lifetime Benefit | Receive a lifetime (or joint and survivor lifetime) benefit with annuity payments based on the entire balance in the ORP account at the time payments begin. |
| Lump-Sum (Initial) Benefit | The ORP cannot be distributed as a cash distribution payable to the participant or a single lump sum. However, a one-time, lump-sum payment of up to 36 months of the annuity is available from the ORP account at the time of retirement in addition to a lifetime annuity. If the up-front, lump sum is chosen, lifetime benefits would be reduced accordingly (La. R.S. 11:929B). |
| Rollover | Roll over all or a portion of the ORP account balance to an Individual Retirement Account (IRA) or qualified retirement plan. |

**Annual disbursements must be an amount sufficient to satisfy federally required minimum distributions.*



All payment options/distributions must be approved by your ORP carrier.

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Electing to leave the ORP and join the TRSL defined benefit plan

Eligible active, contributing ORP participants can make an irrevocable election to leave the ORP and join the TRSL defined benefit plan by submitting the *Election to Join TRSL after ORP Participation* (Form 2TR) to TRSL. With this election, the participant will join the pension system as a new member in the 2015 Plan. For more information about the 2015 Plan, visit www.TRSL.org.

There is a limited window of opportunity for leaving the ORP in order to join the TRSL defined benefit plan. Your window depends on when your ORP eligibility began. You also must meet other eligibility requirements.

What's my deadline for making the election?

First ORP-eligible employment was before August 1, 2020:

Current ORP participant

Active and contributing as of June 2024

Deadline for TRSL to receive election request:

June 30, 2025



First ORP-eligible employment was on/after August 1, 2020:

Current ORP participant

Active and contributing at time of election

Deadline for TRSL to receive election request:

At any time within five years of first ORP-eligible employment. Your deadline could be as early as July 31, 2025.



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When will my new election be effective?

One-year window

- If TRSL receives the completed *Election to Join TRSL after ORP Participation (Form 2TR)* on or before December 31, 2024: ORP participation will end January 31, 2025, and enrollment in the TRSL defined benefit plan will begin prospectively on February 1, 2025.
- If TRSL receives the completed *Form 2TR* after December 31, 2024: ORP participation will end on the last day of the month following the month in which TRSL receives the completed election form. Enrollment in the TRSL defined benefit plan will begin prospectively on the first day of the month following the end of ORP participation.

Example: If TRSL receives a completed, signed Form 2TR on March 12, 2025, the ORP contributions will cease on April 30, 2025, and TRSL membership and contributions will begin on May 1, 2025.

Five-year window

- ORP participation will end on the last day of the month following the month in which TRSL receives the completed *Election to Join TRSL after ORP Participation (Form 2TR)*. Enrollment in the TRSL defined benefit plan will begin prospectively on the first day of the month following the end of ORP participation.

Example: If TRSL receives a completed, signed Form 2TR on November 10, 2024, the ORP contributions will cease on December 31, 2024, and TRSL membership and contributions will begin on January 1, 2025.

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FREQUENTLY ASKED QUESTIONS about joining the defined benefit plan

How can I make this election?

Use Form 2TR, which is available from your employer. This form must be completed by you and your employer within the time limit set by state law. See table on page 8 for deadlines.

Who is not eligible for TRSL?

Anyone whose position is part-time, seasonal, or temporary

If I join TRSL, when will I be eligible to retire?

You can retire at age 62 with at least 5 years of service, or at any age with at least 20 years of service (actuarially reduced).

I was in the TRSL defined benefit plan before joining the ORP. What happens to my pre-ORP service credit balance that I left with TRSL?

If you left contributions with TRSL and did not roll them over to your ORP account, that service credit may be used to increase your monthly benefit but it cannot be used to attain eligibility for retirement. Pre-ORP service credit also will not count toward eligibility for disability or survivor benefits.

Can I transfer my ORP account into TRSL?

No, the ORP account will always remain separate from your TRSL pension. ORP funds cannot be transferred into TRSL and TRSL service credit cannot be given for your ORP participation time. You will continue to be able to manage the funds in your ORP account, but no new contributions can be made to your ORP account. You can receive distributions from your ORP account once you retire from the defined benefit plan or terminate all TRSL-eligible employment.

Can I refund my ORP contributions and use them to purchase service credit in the TRSL defined benefit plan?

No. State law does not permit this.

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TRSL or the ORP: Which one?

The decision to join the ORP is irrevocable once your election window provided by La.R.S.11:932 expires. You should look at your career expectations carefully and realistically before deciding whether to enroll in TRSL or the ORP.

For more information on the differences between the two plans, refer to the comparison charts on page 12.

Questions to ask the SSA:

- “At what age can I receive my ORP benefit, and how much will it be?”
- “What is the earliest I can receive SS benefits? This amount be me?”
- “Are there any savings I’m collecting SS while I am still in and paying into TRSL?”
- “Do I qualify to receive ORP?”
- “If GPO or WEP does not affect my SS benefits, how much will my SS benefits be?”

Social Security

If you are also eligible for Social Security benefits from other employment, your Social Security benefit may be reduced according to federal regulations regardless of whether you participate in TRSL or the ORP.

For more information, see our brochure *Social Security & TRSL Benefits* at www.TRSL.org.

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ORP Handbook

| Comparison of benefit features | |
|---------------------------------------|---|
| Plan type | |
| TRSL | Defined benefit plan: Monthly pension determined by years of service, highest five-year average annual salary, and a benefit factor of 2.5%. |
| ORP | Defined contribution plan: Retirement benefit determined by contributions and investment performance. |
| Contributions | |
| TRSL | Contributions do not determine benefits. Employee's contribution is 8% of salary. The employer makes a normal cost contribution. |
| ORP | Contributions determine benefits. Employee's contribution is 8% of salary (less a 0.05% administrative fee). <ul style="list-style-type: none">• Higher education employer contribution: The employer contribution rate is 6.2%.• Non-higher education employer contribution: The employer rate is 6.2%. |
| Duration of benefit | |
| TRSL | Lifetime benefit. No matter how long you live, the retirement benefit will continue. |
| ORP | Duration of benefit is based on the amount accumulated in participant's ORP account. |
| When benefit is payable | |
| TRSL | Lifetime benefit payable at: <ul style="list-style-type: none">• Age 62 with five years of service credit• Any age with 20 years of service credit (actuarially reduced) (Excludes military service purchased after September 10, 1982) |
| ORP | Annuity with or without a partial lump-sum payout possible at time of retirement. Rollover of up to 100% of ORP funds to an IRA or qualified plan may be done after termination of all covered ORP participation. |
| Guaranteed by | |
| TRSL | State of Louisiana |
| ORP | Solvency of the ORP carrier |

Appendix D

ORP Handbook

| Plan election | |
|--------------------------------------|---|
| TRSL | Unless an election is made to participate in the ORP, employees will be enrolled in TRSL. |
| ORP | From the date of employment, eligible employees can enroll in the ORP at any point before earning five years of TRSL service credit. The decision to join ORP is irrevocable once the election window provided by La.R.S.11.932 expires. |
| Survivor benefits | |
| TRSL | Upon your death, if you have five years of service credit, your spouse and minor child(ren) may be eligible for survivor benefits. |
| ORP | Upon your death, the balance of the ORP account is paid out in a lump sum or as an annuity. |
| Disability benefits | |
| TRSL | If you have 10 years of service credit (excluding service credit earned while on workers' compensation) and become disabled, you may be eligible for TRSL disability benefits for life. <i>NOTE: For individuals who first became members of a state public retirement system on or after January 1, 2011.</i> |
| ORP | Benefit based on accumulated contributions, payable at your option, after termination of ORP participation. No other disability benefits are included. |
| Portability of benefit | |
| TRSL | Transferrable to other Louisiana public schools, colleges and universities, technical colleges, and many public agencies. |
| ORP | Portable to most U.S. colleges and universities. |
| Investment decisions | |
| TRSL | TRSL controls the plan investments, which include your contributions, and bears the risk. The benefits a retiree receives from the TRSL plan are not dependent upon the investment decisions of TRSL or changes in the investment markets. |
| ORP | Participant controls own investments and bears the risk. <i>See ORP carrier's brochure.</i> |
| Social Security Participation | |
| TRSL | TRSL members do not participate in Social Security, but are subject to Social Security reductions through the Windfall Elimination Provision and Government Pension Offset (WEP/GPO). |
| ORP | ORP participants do not participate in Social Security, but are subject to Social Security reductions through the Windfall Elimination Provision and Government Pension Offset (WEP/GPO). |

Appendix D

ORP Handbook

 Teachers' Retirement
System of Louisiana

We're here to help!

Physical address:
8401 United Plaza Blvd, Ste 300
Baton Rouge LA 70809-7017

Mailing address:
PO Box 94123
Baton Rouge LA 70804-9123

Telephone: 225-925-6446
Toll free (outside Baton Rouge area):
1-877-ASK-TRSL (1-877-275-8775)

Questions: AskTRSL.org
Web: www.TRSL.org

Facebook: facebook.com/TRSLonline
Twitter: [@TRSLonline](https://twitter.com/TRSLonline)
YouTube: [TRSLonline](https://www.youtube.com/TRSLonline)

Appendix E

NASRA Comparisons of Southern State ORPs



NASRA

**Core Retirement Benefits for Higher Education Employees of
Southeastern Conference Schools**

Key Findings

Sixteen universities participate in the Southeastern Conference (SEC).

Number of SEC schools by retirement plan type

- No choice: defined benefit plan only: 2
 - University of Alabama and Auburn University
- No choice: defined contribution plan only: 4
 - University of Arkansas, University of Kentucky, University of Missouri, and Vanderbilt University
- Choice of hybrid (DB-DC) plan or DC only: 1
 - University of Tennessee
- Choice of defined benefit or defined contribution plan: 9

Number of SEC schools participating in Social Security

- 15; LSU is the lone SEC school whose employees do not participate in Social Security

ORP/DC Plan Contribution Rates

- Median default employer contribution rate to optional or mandatory DC plan accounts: 8.25%
 - Range: 3.0% to 15.246%
- Median default employee contribution rate to optional or mandatory DC plan accounts: 6.33%
 - Range: Zero to 9.0%
- Some universities permit plan participants to contribute more than the default rate. In some of these plans, employers match some or all additional employee contributions.

Default Options and Switching Plans

- Of the 10 schools that offer new hires a choice of plans:
 - the default option or election is the traditional pension plan except at the University of Florida, where the default is a DC plan, and the University of Tennessee, where the default option is a hybrid (DB-DC) plan.
 - the default option or election is irrevocable in all schools except three:
 - University of Florida, Louisiana State University, and the University of South Carolina
- Louisiana State University and the University of South Carolina permit those who elected the ORP to switch to the DB pension plan within five years of their hire date. The University of Florida provides all participants, regardless of their initial election or default, one additional opportunity at any point prior to retirement to switch plans. Those who elected or defaulted to the DC plan may incur a buy-in cost associated with transferring to the pension plan.

Findings reflect the information contained in the appendix, which presents retirement plan arrangements for employees hired today. Some universities have modified their retirement plan designs in recent years.

Prepared August 2024
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Appendix E

NASRA Comparisons of Southern State ORPs

| Selected Details of Retirement Benefits for Employees Hired Currently at Southeastern Conference Schools | | | | | | | |
|--|------------------------|--|-----------------|---|--|--|-----------------------------------|
| State | School(s) | Retirement Benefit Available and Default Option | Social Security | Employer Contribution to ORP/DC Plan | Employee Contribution to ORP/DC Plan | Time for new hires to decide on plan option and option to switch plans* | Third-Party Administrators |
| AL | Auburn University | No ORP; participation in the Retirement Systems of Alabama pension is mandatory | Yes | NA | NA | NA | NA |
| AL | University of Alabama | No ORP; participation in the Retirement Systems of Alabama pension is mandatory | Yes | NA | NA | NA | NA |
| AR | University of Arkansas | No ORP; participation in a defined contribution plan is mandatory | Yes | Default employee and employer contribution rate of 5%; employer matches employee contributions up to 10%, for a maximum contribution of 20% | | NA | Fidelity, TIAA |
| FL | University of Florida | Most faculty and staff are required to participate in the Florida Retirement System, which offers a choice of a pension or a defined contribution plan. Those who do not make an active election default to the Investment Plan, which is the defined contribution plan. | Yes | 5.14% | 3.0%; employees may contribute up to 5.14% | New hires have 8 months to elect the DB plan before defaulting in the DC plan. New hires are given one remaining election before retirement to participate in the other plan after the initial election (whether active or default election). If the member elected or defaulted to the DC plan, there may be a buy-in cost associated with transferring to the DB plan. | Corebridge, Equitable, TIAA, Voya |

*Unless otherwise indicated, plan defaults and elections are irrevocable.
 Compiled by NASRA August 2024
 Contact: Keith Brainard kbrnrd@npsra.org or Alex Brown alex@npsra.org



Appendix E

NASRA Comparisons of Southern State ORPs

| Selected Details of Retirement Benefits for Employees Hired Currently at Southeastern Conference Schools | | | | | | | |
|--|------------------------------|---|-----------------|--------------------------------------|--------------------------------------|---|----------------------------|
| State | School(s) | Retirement Benefit Available and Default Option | Social Security | Employer Contribution to ORP/DC Plan | Employee Contribution to ORP/DC Plan | Time for new hires to decide on plan option and option to switch plans* | Third-Party Administrators |
| GA | University of Georgia | All exempt employees working 20 or more hours weekly are eligible for the ORP. Those who do not make an active election default to the TRS of GA pension plan. | Yes | 9.24% | 6.00% | 60 days | Corebridge, Fidelity, TIAA |
| KY | University of Kentucky | No ORP; faculty and staff participate only in a defined contribution plan. | Yes | 10% | 5% | NA | Fidelity, TIAA |
| LA | Louisiana State University | Faculty and administrative staff may elect to participate in the ORP. Those who do not make an active election default to the TRS of LA pension plan. | No | 6.20% | 8.00% | 60 days; those who elect the ORP may switch to the TRS of LA pension plan within 5 years of their initial election, where service credit accrues prospectively. | Corebridge, TIAA, Voya |
| MO | University of Missouri | No ORP; all new faculty and staff hires since 2019 participate only in a defined contribution plan. | Yes | 8.00% | 8.00% | NA | Fidelity |
| MS | Mississippi State University | Faculty is eligible to participate in the PERS pension plan or the ORP. Only non-faculty members with administrative budget authority, and librarians are eligible to participate in the ORP. Those who do not make an active election default to the MS PERS pension plan. | Yes | 14.751% | 9.00% | 30 days | Corebridge, TIAA, Voya |

*Unless otherwise indicated, plan defaults and elections are irrevocable.
 Compiled by NASRA August 2024
 Contact: Keith Brainard kbrnrd@npsam.org or Alex Brown alex@npsam.org



Appendix E

NASRA Comparisons of Southern State ORPs

| Selected Details of Retirement Benefits for Employees Hired Currently at Southeastern Conference Schools | | | | | | | |
|--|------------------------------|--|-----------------|--------------------------------------|--------------------------------------|--|---------------------------------|
| State | School(s) | Retirement Benefit Available and Default Option | Social Security | Employer Contribution to ORP/DC Plan | Employee Contribution to ORP/DC Plan | Time for new hires to decide on plan option and option to switch plans* | Third-Party Administrators |
| MS | University of Mississippi | Faculty is eligible to participate in the PERS pension plan or the ORP. Administrators with budgetary authority, researchers, coaches, and librarians with academic rank are eligible to participate in the ORP. Those who do not make an active election default to the MS PERS pension plan. | Yes | 15.246% | 9.00% | 30 days | Corebridge, TIAA, Voya |
| OK | University of Oklahoma | All new faculty and staff hires since 1/1/23 may elect the OK TRS or the ORP. Those who do not make an active election default to the OK TRS pension plan. | Yes | 9.00% | non-contributory for employees | 30 days | Fidelity |
| SC | University of South Carolina | All new faculty and staff hires may elect to participate in the SCRS pension plan or the ORP. Those who do not make an active election default to the SCRS pension plan. | Yes | 5.00% | 9.00% | 30 days. Members electing the ORP when they are hired may switch to SCRS during open enrollment periods within the first 5 years of employment, where they may use their DC plan assets to purchase the service accrued since they were first hired. | Corebridge, Empower, TIAA, Voya |

*Unless otherwise indicated, plan defaults and elections are irrevocable.
 Compiled by NASRA August 2024
 Contact: Keith Brainard kbrnrd@npsa.org or Alex Brown alex@npsa.org



Appendix E

NASRA Comparisons of Southern State ORPs

| Selected Details of Retirement Benefits for Employees Hired Currently at Southeastern Conference Schools | | | | | | | |
|--|-------------------------------|--|-----------------|---|--------------------------------------|--|---|
| State | School(s) | Retirement Benefit Available and Default Option | Social Security | Employer Contribution to ORP/DC Plan | Employee Contribution to ORP/DC Plan | Time for new hires to decide on plan option and option to switch plans* | Third-Party Administrators |
| TN | University of Tennessee | All new faculty and staff hires may elect to participate in the TCRS DB-DC hybrid plan or the ORP. Those who do not make an election default into the hybrid plan. | Yes | 9.00% | 5.00% | New hires must make their retirement plan election on their first day of employment. | TIAA, Voya |
| TN | Vanderbilt University | No ORP; participation in the defined contribution plan is mandatory | Yes | Employees and employers each contribute 3%; the employer matches employee contributions up to 6%, for a maximum contribution of 12% | | NA | Fidelity |
| TX | Texas A&M University | Faculty, key administrative positions, and staff members specified in statute are eligible to join the ORP. Staff positions not specified in statute may participate only in the TRS pension plan. Those who do not make an election default into the TRS of TX pension plan. | Yes | 6.60% | 6.65% | 90 days | Corebridge, Fidelity, Lincoln Financial Group, Pentegra, TIAA, Voya |
| TX | University of Texas at Austin | These positions are generally ORP-eligible: faculty, professional librarians; chief and senior administrative officials; specialized professional positions (e.g., physicians, engineers, and attorneys); athletic coaches and directors; counselors treated in the same manner as faculty. Those who do not make an election default into the TRS of TX pension plan. | Yes | 8.50% | 6.65% | 90 days | Corebridge, Fidelity, Lincoln Financial Group, TIAA, Voya |

*Unless otherwise indicated, plan defaults and elections are irrevocable.

Compiled by NASRA August 2024

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 **NASRA**

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2025-26 through FY 2024-25) | | | | | | | |
|--|------------------------|----------------------|---------------|--------------------|-----------|------------|-----------------------------|
| FISCAL YEAR | TRSL SUB-PLAN | EMPLOYEE NORMAL COST | EMPLOYER RATE | | | | |
| | | | Normal Cost | Admin Expense Rate | AFC Rate* | Shared UAL | Total Employer Contribution |
| 2025-26 | K-12 Regular Plan | 8.0% | 3.67% | 0.36% | 1.75% | 15.17% | 20.95% |
| | Plan A | 9.1% | | | | | |
| | Plan B | 5.0% | | | | | |
| 2024-25 | Higher Ed Regular Plan | 8.0% | 3.05% | 0.36% | 1.75% | 15.17% | 20.33% |
| | K-12 Regular Plan | 8.0% | | | | | |
| | Plan A | 9.1% | | | | | |
| | Plan B | 5.0% | | | | | |
| Higher Ed Regular Plan | | 8.0% | 3.10% | 0.38% | 1.50% | 15.90% | 20.88% |

*Pursuant to Act 184 of 2023, the AFC (Account Funding Contribution) rate is a component of the total employer contribution rate, effective FY 2024-25, used to directly pay for future permanent benefit increases (PBIs). The AFC rate will gradually increase to reflect certain employer contribution rate reductions, but will be capped at 2.5% of payroll.

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2023-24 through 2018-19)* | | | | | | |
|--|------------------------|----------------------|---------------|---------------------|------------|-------------------------------|
| FISCAL YEAR | TRSL SUB-PLAN | EMPLOYEE NORMAL COST | EMPLOYER RATE | | | |
| | | | Normal Cost | Admin Expense Rate* | Shared UAL | Total Employer Contribution** |
| 2023-24 | K-12 Regular Plan | 8.0% | 3.5748% | 0.37% | 20.16% | 24.1% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| | Higher Ed Regular Plan | 8.0% | | | | |
| 2022-23 | K-12 Regular Plan | 8.0% | 3.6398% | 0.37% | 20.8% | 24.8% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| | Higher Ed Regular Plan | 8.0% | | | | |
| 2021-22 | K-12 Regular Plan | 8.0% | 3.3377% | 0.38% | 21.47% | 25.2% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| | Higher Ed Regular Plan | 8.0% | | | | |
| 2020-21 | K-12 Regular Plan | 8.0% | 3.5504% | 0.39% | 21.8% | 25.8% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| | Higher Ed Regular Plan | 8.0% | | | | |

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2023-24 through 2018-19) cont'd* | | | | | | |
|---|------------------------|----------------------|---------------|---------------------|------------|-------------------------------|
| FISCAL YEAR | TRSL SUB-PLAN | EMPLOYEE NORMAL COST | EMPLOYER RATE | | | |
| | | | Normal Cost | Admin Expense Rate* | Shared UAL | Total Employer Contribution** |
| 2019-20 | K-12 Regular Plan | 8.0% | 3.3595% | 0.45% | 22.2% | 26.0% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| 2018-19 | Higher Ed Regular Plan | 8.0% | 2.6418% | 0.45% | 22.2% | 25.3% |
| | K-12 Regular Plan | 8.0% | 4.4498% | 0.45% | 21.8% | 26.7% |
| | Plan A | 9.1% | | | | |
| | Plan B | 5.0% | | | | |
| | Higher Ed Regular Plan | 8.0% | 3.2187% | 0.45% | 21.8% | 25.5% |

*Act 95 of 2016 consolidated all K-12 employee sub-plans (Lunch Plan A and Lunch Plan B) into a single plan for which employer contribution rates must be calculated.

*Act 94 of 2016 required the retirement system administrative expenses to be funded annually through the employer contribution rate rather than amortized over 30 years. This funding method began in FY 2018-19.

**Rounded

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2017-18 through FY 2013-14)* | | | | | |
|---|------------------------|----------------------|---------------|------------|-------------------------------|
| FISCAL YEAR | TRSL SUB-PLAN | EMPLOYEE NORMAL COST | EMPLOYER RATE | | |
| | | | Normal Cost | Shared UAL | Total Employer Contribution** |
| 2017-18 | K-12 Regular Plan | 8.0% | 4.3642% | 22.2% | 26.6% |
| | Plan A | 9.1% | | | |
| | Plan B | 5.0% | | | |
| | Higher Ed Regular Plan | 8.0% | 3.2194% | 22.2% | 25.4% |
| 2016-17 | K-12 Regular Plan | 8.0% | 4.3127% | 21.2% | 25.5% |
| | Higher Ed Regular Plan | 8.0% | 3.2272% | 21.2% | 24.4% |
| | Plan A | 9.1% | 9.5044% | 21.2% | 30.7% |
| | Plan B | 5.0% | 6.9670% | 21.2% | 28.2% |
| 2015-16 | K-12 Regular Plan | 8.0% | 4.3564% | 22.0% | 26.3% |
| | Higher Ed Regular Plan | 8.0% | 3.3226% | 22.0% | 25.3% |
| | Plan A | 9.1% | 9.2683% | 22.0% | 31.3% |
| | Plan B | 5.0% | 6.8485% | 22.0% | 28.8% |
| 2014-15 | K-12 Regular Plan | 8.0% | 5.2545% | 22.7% | 28.0% |
| | Higher Ed Regular Plan | 8.0% | 3.6658% | 22.7% | 26.4% |
| | Plan A | 9.1% | 10.4157% | 22.7% | 33.1% |
| | Plan B | 5.0% | 7.4148% | 22.7% | 30.1% |
| 2013-14 | K-12 Regular Plan | 8.0% | 5.8216% | 21.3% | 27.2% |
| | Higher Ed Regular Plan | 8.0% | 5.1839% | 21.3% | 26.5% |
| | Plan A | 9.1% | 11.2947% | 21.3% | 32.6% |
| | Plan B | 5.0% | 7.7724% | 21.3% | 29.1% |

* Act 95 of 2016 consolidated all K-12 employee sub-plans (Lunch Plan A and Lunch Plan B) into a single plan for which employer contribution rates must be calculated.

**Rounded

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2012-13)* | | | | | | |
|--|------------------------|----------------------|---------------|------------|-------------|-------------------------------|
| FISCAL YEAR | TRSL SUB-PLAN | EMPLOYEE NORMAL COST | EMPLOYER RATE | | | Total Employer Contribution** |
| | | | Normal Cost | Shared UAL | Normal Cost | |
| 2012-13 | K-12 Regular Plan | 8.0% | 5.8% | 18.7% | 24.5% | |
| | Higher Ed Regular Plan | 8.0% | 5.7% | 18.7% | 24.4% | |
| | Plan A | 9.1% | 11.3% | 18.7% | 30.0% | |
| | Plan B | 5.0% | 7.9% | 18.7% | 26.6% | |

*Act 716 of the 2012 legislative session calls for the calculation of individualized employer contribution rates for each of the sub-plans TRSL administers: K-12 Regular Plan; higher ed Regular Plan; school food service Plan A; and school food service Plan B. (Effective FY 2012-2013 and thereafter.)

**Rounded

| Historical TRSL Contribution Rates (FY 2011-12 through FY 1936-37) | | | | | | | |
|--|--------------|-------------|--------------------|--------|----------|--------|--------------|
| FISCAL YEAR | REGULAR PLAN | | | PLAN A | | PLAN B | |
| | Member | Employer | | Member | Employer | Member | Employer |
| | | Normal Cost | Unfunded Liability | | | | |
| 2011-12 | 8.00% | 5.97% | 17.73% | 23.70% | 9.10% | 23.70% | 5.00% 23.70% |
| 2010-11 | 8.00% | 5.70% | 14.50% | 20.20% | 9.10% | 20.20% | 5.00% 20.20% |
| 2009-10 | 8.00% | 5.76% | 9.74% | 15.50% | 9.10% | 15.50% | 5.00% 15.50% |
| 2008-09 | 8.00% | 6.95% | 8.55% | 15.50% | 9.10% | 15.50% | 5.00% 15.50% |
| 2007-08 | 8.00% | 6.93% | 9.67% | 16.60% | 9.10% | 16.60% | 5.00% 16.60% |
| 2006-07 | 8.00% | 6.64% | 9.16% | 15.80% | 9.10% | 15.80% | 5.00% 15.80% |
| 2005-06 | 8.00% | 6.51% | 9.39% | 15.90% | 9.10% | 15.90% | 5.00% 15.90% |
| 2004-05 | 8.00% | 6.26% | 9.24% | 15.50% | 9.10% | 15.50% | 5.00% 15.50% |
| 2003-04 | 8.00% | 6.71% | 7.09% | 13.80% | 9.10% | 13.80% | 5.00% 13.80% |

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2011-12 through FY 1936-37) | | | | | | | | |
|--|--------------|-------------|--------------------|--------|--------|----------|--------|----------|
| FISCAL YEAR | REGULAR PLAN | | | PLAN A | | PLAN B | | |
| | Member | Employer | | | Member | Employer | Member | Employer |
| | | Normal Cost | Unfunded Liability | Total | | | | |
| 2002-03 | 8.00% | 6.75% | 6.35% | 13.10% | 9.10% | 13.10% | 5.00% | 13.10% |
| 2001-02 | 8.00% | 6.77% | 6.33% | 13.10% | 9.10% | 13.10% | 5.00% | 13.10% |
| 2000-01 | 8.00% | 6.86% | 7.34% | 14.20% | 9.10% | 14.20% | 5.00% | 14.20% |
| 1999-00 | 8.00% | 6.93% | 8.27% | 15.20% | 9.10% | 15.20% | 5.00% | 15.20% |
| 1998-99 | 8.00% | 7.03% | 9.47% | 16.50% | 9.10% | 16.50% | 5.00% | 16.50% |
| 1997-98 | 8.00% | 7.02% | 9.38% | 16.40% | 9.10% | 16.40% | 5.00% | 16.40% |
| 1996-97 | 8.00% | 6.96% | 9.34% | 16.30% | 9.10% | 16.30% | 5.00% | 16.30% |
| 1995-96 | 8.00% | 7.09% | 9.41% | 16.50% | 9.10% | 16.50% | 5.00% | 16.50% |
| 1994-95 | 8.00% | 6.87% | 9.33% | 16.20% | 9.10% | 16.20% | 5.00% | 16.20% |
| 1993-94 | 8.00% | 6.81% | 9.39% | 16.20% | 9.10% | 16.20% | 5.00% | 16.20% |
| 1992-93 | 8.00% | 6.73% | 9.67% | 16.40% | 9.10% | 16.40% | 5.00% | 16.40% |
| 10/91-6/92 | 8.00% | 6.57% | 10.73% | 17.98% | 9.10% | 17.98% | 5.00% | 17.98% |
| 7/91-9/91 | 8.00% | 6.57% | 10.73% | 17.30% | 9.10% | 17.30% | 5.00% | 17.30% |
| 1990-91 | 8.00% | 5.97% | 7.83% | 13.80% | 9.10% | 13.80% | 5.00% | 13.80% |
| 1989-90 | 8.00% | | | 17.20% | 9.10% | 17.20% | 5.00% | 17.20% |
| 1988-89 | 7.00% | | | 10.30% | 9.10% | 11.45% | 5.00% | 7.10% |
| 1987-88 | 7.00% | | | 10.30% | 9.10% | 11.45% | 5.00% | 7.10% |
| 1986-87 | 7.00% | | | 10.30% | 9.10% | 11.45% | 5.00% | 7.10% |
| 1985-86 | 7.00% | | | 10.30% | 9.10% | 11.45% | 5.00% | 7.10% |
| 1984-85 | 7.00% | | | 9.30% | 9.10% | 10.45% | 5.00% | 6.10% |
| 1983-84 | 7.00% | | | 9.30% | 9.10% | 10.45% | 5.00% | 6.10% |
| 1982-83 | 7.00% | | | 9.30% | 9.10% | 10.45% | 5.00% | 6.10% |

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2011-12 through FY 1936-37) | | | | | | | |
|--|--------------|-------------|--------------------|--------|----------|--------|-------------|
| FISCAL YEAR | REGULAR PLAN | | | PLAN A | | PLAN B | |
| | Member | Employer | | Member | Employer | Member | Employer |
| | | Normal Cost | Unfunded Liability | | | | |
| 1981-82 | 7.00% | | | 9.24% | 9.10% | 10.43% | 5.00% 6.08% |
| 1980-81 | 7.00% | | | 9.00% | 9.10% | 10.35% | 5.00% 6.00% |
| 1979-80 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1978-79 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1977-78 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1976-77 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1975-76 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1974-75 | 7.00% | | | 8.00% | 5.85% | 5.85% | ¥ 3.50% |
| 1973-74 | 7.00% | | | 7.50% | 4.80% | 4.80% | ¥ 3.50% |
| 1972-73 | 7.00% | | | 7.50% | 4.80% | 4.80% | ¥ 3.50% |
| 1971-72 | 7.00% | | | 8.00% | | | ¥ 3.50% |
| 1970-71 | 7.00% | | | 8.46% | | | ¥ 3.50% |
| 1969-70 | 7.00% | | | 9.96% | | | ¥ 3.50% |
| 1968-69 | 7.00% | | | 9.96% | | | ¥ 3.50% |
| 1967-68 | 7.00% | | | 9.96% | | | ¥ 3.50% |
| 1966-67 | 7.00% | | | 9.96% | | | ¥ 3.50% |
| 1965-66 | 6.00% | | | 9.96% | | | ¥ 3.50% |
| 1964-65 | 6.00% | | | 9.96% | | | ¥ 3.50% |
| 1963-64 | 6.00% | | | 9.96% | | | ¥ 3.50% |
| 1962-63 | 6.00% | | | 9.96% | | | ¥ 3.50% |
| 1961-62 | 6.00% | | | 9.96% | | | ¥ 3.50% |

*The member contribution rate was 0.5% on the first \$1,200 and 4% on the amount over \$1,200. If the member's total salary was \$1,200 or less, then the employer rate was two times the employee contributions due.

Appendix F

TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2011-12 through FY 1936-37) | | | | | | | |
|--|--------------|-------------|--------------------|--------|----------|--------|----------|
| FISCAL YEAR | REGULAR PLAN | | | PLAN A | | PLAN B | |
| | Member | Employer | | Member | Employer | Member | Employer |
| | | Normal Cost | Unfunded Liability | | | | |
| 1960-61 | 6.00% | | | 9.96% | | ¥ | 3.50% |
| 1959-60 | 6.00% | | | 12.33% | | ¥ | 3.50% |
| 1958-59 | 6.00% | | | 12.33% | | ¥ | 3.50% |
| 1957-58 | 6.00% | | | 12.33% | | ¥ | 3.50% |
| 1956-57 | 6.00% | | | 11.73% | | ¥ | 3.50% |
| 1955-56 | 6.00% | | | 11.40% | | ¥ | 3.50% |
| 1954-55 | 6.00% | | | 11.40% | | ¥ | 3.50% |
| 1953-54 | 6.00% | | | 11.40% | | ¥ | 3.50% |
| 1952-53 | 6.00% | | | 11.28% | | ¥ | 3.50% |
| 1951-52 | 6.00% | | | 11.28% | | | |
| 1950-51 | 6.00% | | | 11.28% | | | |
| 1949-50 | 6.00% | | | 11.28% | | | |
| 1948-49 | 6.00% | | | 11.28% | | | |
| 1947-48 | 5.00% | | | 6.50% | | | |
| 1946-47 | 5.00% | | | 6.40% | | | |
| 1945-46 | 4.00% | | | 5.60% | | | |
| 1944-45 | 4.00% | | | 5.60% | | | |
| 1943-44 | 4.00% | | | 5.47% | | | |
| 1942-43 | 4.00% | | | 5.47% | | | |
| 1941-42 | 4.00% | | | 5.37% | | | |
| 1940-41 | 4.00% | | | 5.37% | | | |

*The member contribution rate was 0.5% on the first \$1,200 and 4% on the amount over \$1,200. If the member's total salary was \$1,200 or less, then the employer rate was two times the employee contributions due.

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TRSL and ORP Historical Contribution Rates

| Historical TRSL Contribution Rates (FY 2011-12 through FY 1936-37) | | | | | | | |
|--|--------------|-------------|--------------------|--------|----------|--------|----------|
| FISCAL YEAR | REGULAR PLAN | | | PLAN A | | PLAN B | |
| | Member | Employer | | Member | Employer | Member | Employer |
| | | Normal Cost | Unfunded Liability | | | | |
| 1939-40 | 4.00% | | | 5.37% | | | |
| 1938-39 | 4.00% | | | 5.37% | | | |
| 1937-38 | 4.00% | | | 5.10% | | | |
| 1936-37 | 4.00% | | | 5.10% | | | |

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2025-26) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.20% | 15.17% | 21.37% |
| 0200 - Louisiana Board of Regents | 6.20% | 15.17% | 21.37% |
| Board of Supervisors of Louisiana State University | 6.20% | 15.17% | 21.37% |
| 0071 - LSU Baton Rouge | 6.20% | 15.17% | 21.37% |
| 0074 - LSU Medical Center New Orleans | 6.20% | 15.17% | 21.37% |
| 0149 - LSU Medical Center Shreveport | 6.20% | 15.17% | 21.37% |
| 0245 - Lallie Karp Medical Center | 6.20% | 15.17% | 21.37% |
| 0277 - LSU Health Sciences Center | 6.20% | 15.17% | 21.37% |
| 0344 - LSU Lab School | 6.20% | 15.17% | 21.37% |
| Board of Supervisors of Southern University | 6.20% | 15.17% | 21.37% |
| 0079 - Southern University Baton Rouge | 6.20% | 15.17% | 21.37% |
| 0080 - Southern University New Orleans | 6.20% | 15.17% | 21.37% |
| 0136 - Southern University Shreveport/Bossier | 6.20% | 15.17% | 21.37% |
| 0347 - Southern Lab School | 6.20% | 15.17% | 21.37% |

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TRSL and ORP Historical Contribution Rates



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|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.20% | 15.17% | 21.37% |
| 0156 - Board of Supervisors University of Louisiana System | 6.20% | 15.17% | 21.37% |
| 0069 - Louisiana Tech | 6.20% | 15.17% | 21.37% |
| 0070 - Northwestern State University | 6.20% | 15.17% | 21.37% |
| 0072 - University of New Orleans | 6.20% | 15.17% | 21.37% |
| 0075 - Nicholls State University | 6.20% | 15.17% | 21.37% |
| 0076 - Southeastern LA University | 6.20% | 15.17% | 21.37% |
| 0077 - University of Louisiana Lafayette | 6.20% | 15.17% | 21.37% |
| 0078 - Grambling State University | 6.20% | 15.17% | 21.37% |
| 0098 - McNeese State University | 6.20% | 15.17% | 21.37% |
| 0099 - University of Louisiana Monroe | 6.20% | 15.17% | 21.37% |
| 0343 - A.E. Phillips Lab School | 6.20% | 15.17% | 21.37% |
| 0345 - Northwestern Lab School | 6.20% | 15.17% | 21.37% |
| 0346 - Southeastern Lab School | 6.20% | 15.17% | 21.37% |

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TRSL and ORP Historical Contribution Rates



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|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.20% | 15.17% | 21.37% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.20% | 15.17% | 21.37% |
| 0086 - Delgado | 6.20% | 15.17% | 21.37% |
| 0159 - Elaine Nunez Community College | 6.20% | 15.17% | 21.37% |
| 0242 - Bossier Parish Community College | 6.20% | 15.17% | 21.37% |
| 0250 - South Louisiana Community College | 6.20% | 15.17% | 21.37% |
| 0257 - Baton Rouge Community College | 6.20% | 15.17% | 21.37% |
| 0258 - River Parishes Community College | 6.20% | 15.17% | 21.37% |
| 0281 - Louisiana Delta Community College | 6.20% | 15.17% | 21.37% |
| The institutions listed below are not ORP-eligible employers, but may employ individuals who joined the ORP under an eligible employer. In these circumstances, the aforementioned individuals must remain in the ORP for all TRSL-eligible positions, and the contribution rates below are applicable. | | | |
| Other | 6.20% | 15.17% | 21.37% |
| 0091 - SOWELA Technical Community College | 6.20% | 15.17% | 21.37% |
| 0100 - L.E. Fletcher Technical Community College | 6.20% | 15.17% | 21.37% |
| 0176 - Northshore Technical Community College | 6.20% | 15.17% | 21.37% |
| 0183 - Northwest Louisiana Technical Community College | 6.20% | 15.17% | 21.37% |
| 0204 - Central Louisiana Technical Community College | 6.20% | 15.17% | 21.37% |

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2024-25) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.20% | 15.90% | 22.10% |
| 0200 - Louisiana Board of Regents | 6.20% | 15.90% | 22.10% |
| Board of Supervisors of Louisiana State University | 6.20% | 15.90% | 22.10% |
| 0071 - LSU Baton Rouge | 6.20% | 15.90% | 22.10% |
| 0074 - LSU Medical Center New Orleans | 6.20% | 15.90% | 22.10% |
| 0149 - LSU Medical Center Shreveport | 6.20% | 15.90% | 22.10% |
| 0245 - Lallie Kerm Medical Center | 6.20% | 15.90% | 22.10% |
| 0277 - LSU Health Sciences Center | 6.20% | 15.90% | 22.10% |
| 0344 - LSU Lab School | 6.20% | 15.90% | 22.10% |
| Board of Supervisors of Southern University | 6.20% | 15.90% | 22.10% |
| 0079 - Southern University Baton Rouge | 6.20% | 15.90% | 22.10% |
| 0080 - Southern University New Orleans | 6.20% | 15.90% | 22.10% |
| 0136 - Southern University Shreveport/Bossier | 6.20% | 15.90% | 22.10% |
| 0347 - Southern Lab School | 6.20% | 15.90% | 22.10% |

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2024-25) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.20% | 15.90% | 22.10% |
| 0156 - Board of Supervisors University of Louisiana System | 6.20% | 15.90% | 22.10% |
| 0069 - Louisiana Tech | 6.20% | 15.90% | 22.10% |
| 0070 - Northwestern State University | 6.20% | 15.90% | 22.10% |
| 0072 - University of New Orleans | 6.20% | 15.90% | 22.10% |
| 0075 - Nicholls State University | 6.20% | 15.90% | 22.10% |
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| 0098 - McNeese State University | 6.20% | 15.90% | 22.10% |
| 0099 - University of Louisiana Monroe | 6.20% | 15.90% | 22.10% |
| 0343 - A.E. Phillips Lab School | 6.20% | 15.90% | 22.10% |
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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2024-25) | | | |
|---|--------------------|---------------|---------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.20% | 15.90% | 22.10% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.20% | 15.90% | 22.10% |
| 0086 - Delgado | 6.20% | 15.90% | 22.10% |
| 0159 - Elaine Nunez Community College | 6.20% | 15.90% | 22.10% |
| 0242 - Bossier Parish Community College | 6.20% | 15.90% | 22.10% |
| 0250 - South Louisiana Community College | 6.20% | 15.90% | 22.10% |
| 0257 - Baton Rouge Community College | 6.20% | 15.90% | 22.10% |
| 0258 - River Parishes Community College | 6.20% | 15.90% | 22.10% |
| 0281 - Louisiana Delta Community College | 6.20% | 15.90% | 22.10% |
| The institutions listed below are not ORP-eligible employers, but may employ individuals who joined the ORP under an eligible employer. In these circumstances, the aforementioned individuals must remain in the ORP for all TRSL-eligible positions, and the contribution rates below are applicable. | | | |
| Other | 6.20% | 15.90% | 22.10% |
| 0091 - SOWELA Technical Community College | 6.20% | 15.90% | 22.10% |
| 0100 - L.E. Fletcher Technical Community College | 6.20% | 15.90% | 22.10% |
| 0176 - Northshore Technical Community College | 6.20% | 15.90% | 22.10% |
| 0183 - Northwest Louisiana Technical Community College | 6.20% | 15.90% | 22.10% |
| 0204 - Central Louisiana Technical Community College | 6.20% | 15.90% | 22.10% |

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2023-24) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.2% | 20.16% | 26.4% |
| 0200 - Louisiana Board of Regents | 6.2% | 20.16% | 26.4% |
| Board of Supervisors of Louisiana State University | 6.2% | 20.16% | 26.4% |
| 0071 - LSU Baton Rouge | 6.2% | 20.16% | 26.4% |
| 0074 - LSU Medical Center New Orleans | 6.2% | 20.16% | 26.4% |
| 0149 - LSU Medical Center Shreveport | 6.2% | 20.16% | 26.4% |
| 0245 - Lallie Kerm Medical Center | 6.2% | 20.16% | 26.4% |
| 0277 - LSU Health Sciences Center | 6.2% | 20.16% | 26.4% |
| 0344 - LSU Lab School | 6.2% | 20.16% | 26.4% |
| Board of Supervisors of Southern University | 6.2% | 20.16% | 26.4% |
| 0079 - Southern University Baton Rouge | 6.2% | 20.16% | 26.4% |
| 0080 - Southern University New Orleans | 6.2% | 20.16% | 26.4% |
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| 0347 - Southern Lab School | 6.2% | 20.16% | 26.4% |

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| Management Board & Reporting Employers | Employer Rate (ER) | | |
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| 0099 - University of Louisiana Monroe | 6.2% | 20.16% | 26.4% |
| 0343 - A.E. Phillips Lab School | 6.2% | 20.16% | 26.4% |
| 0345 - Northwestern Lab School | 6.2% | 20.16% | 26.4% |
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|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
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| 0200 - Louisiana Board of Regents | 6.2% | 20.8% | 27.0% |
| Board of Supervisors of Louisiana State University | 6.2% | 20.8% | 27.0% |
| 0071 - LSU Baton Rouge | 6.2% | 20.8% | 27.0% |
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| 0242 - Bossier Parish Community College | 6.2% | 20.8% | 27.0% |
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|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.2% | 21.47% | 27.7% |
| 0200 - Louisiana Board of Regents | 6.2% | 21.47% | 27.7% |
| Board of Supervisors of Louisiana State University | 6.2% | 21.47% | 27.7% |
| 0071 - LSU Baton Rouge | 6.2% | 21.47% | 27.7% |
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|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.2% | 21.47% | 27.7% |
| 0156 - Board of Supervisors University of Louisiana System | 6.2% | 21.47% | 27.7% |
| 0069 - Louisiana Tech | 6.2% | 21.47% | 27.7% |
| 0070 - Northwestern State University | 6.2% | 21.47% | 27.7% |
| 0072 - University of New Orleans | 6.2% | 21.47% | 27.7% |
| 0075 - Nicholls State University | 6.2% | 21.47% | 27.7% |
| 0076 - Southeastern LA University | 6.2% | 21.47% | 27.7% |
| 0077 - University of Louisiana Lafayette | 6.2% | 21.47% | 27.7% |
| 0078 - Grambling State University | 6.2% | 21.47% | 27.7% |
| 0098 - McNeese State University | 6.2% | 21.47% | 27.7% |
| 0099 - University of Louisiana Monroe | 6.2% | 21.47% | 27.7% |
| 0343 - A.E. Phillips Lab School | 6.2% | 21.47% | 27.7% |
| 0345 - Northwestern Lab School | 6.2% | 21.47% | 27.7% |
| 0346 - Southeastern Lab School | 6.2% | 21.47% | 27.7% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2021-22) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.2% | 21.47% | 27.7% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.2% | 21.47% | 27.7% |
| 0086 - Delgado | 6.2% | 21.47% | 27.7% |
| 0159 - Elaine Nunez Community College | 6.2% | 21.47% | 27.7% |
| 0242 - Bossier Parish Community College | 6.2% | 21.47% | 27.7% |
| 0250 - South Louisiana Community College | 6.2% | 21.47% | 27.7% |
| 0257 - Baton Rouge Community College | 6.2% | 21.47% | 27.7% |
| 0258 - River Parishes Community College | 6.2% | 21.47% | 27.7% |
| 0281 - Louisiana Delta Community College | 6.2% | 21.47% | 27.7% |
| The institutions listed below are not ORP-eligible employers, but may employ individuals who joined the ORP under an eligible employer. In these circumstances, the aforementioned individuals must remain in the ORP for all TRSL-eligible positions, and the contribution rates below are applicable. | | | |
| Other | 6.2% | 21.47% | 27.7% |
| 0091 - SOWELA Technical Community College | 6.2% | 21.47% | 27.7% |
| 0100 - L.E. Fletcher Technical Community College | 6.2% | 21.47% | 27.7% |
| 0176 - Northshore Technical Community College | 6.2% | 21.47% | 27.7% |
| 0183 - Northwest Louisiana Technical Community College | 6.2% | 21.47% | 27.7% |
| 0204 - Central Louisiana Technical Community College | 6.2% | 21.47% | 27.7% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2020-21) | | | |
|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.2% | 21.8% | 28.0% |
| 0200 - Louisiana Board of Regents | 6.2% | 21.8% | 28.0% |
| Board of Supervisors of Louisiana State University | 6.2% | 21.8% | 28.0% |
| 0071 - LSU Baton Rouge | 6.2% | 21.8% | 28.0% |
| 0074 - LSU Medical Center New Orleans | 6.2% | 21.8% | 28.0% |
| 0149 - LSU Medical Center Shreveport | 6.2% | 21.8% | 28.0% |
| 0245 - Lallie Kemp Medical Center | 6.2% | 21.8% | 28.0% |
| 0277 - LSU Health Sciences Center | 6.2% | 21.8% | 28.0% |
| 0344 - LSU Lab School | 6.2% | 21.8% | 28.0% |
| Board of Supervisors of Southern University | 6.2% | 21.8% | 28.0% |
| 0079 - Southern University Baton Rouge | 6.2% | 21.8% | 28.0% |
| 0080 - Southern University New Orleans | 6.2% | 21.8% | 28.0% |
| 0136 - Southern University Shreveport/Bossier | 6.2% | 21.8% | 28.0% |
| 0347 - Southern Lab School | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2020-21) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.2% | 21.8% | 28.0% |
| 0156 - Board of Supervisors University of Louisiana System | 6.2% | 21.8% | 28.0% |
| 0069 - Louisiana Tech | 6.2% | 21.8% | 28.0% |
| 0070 - Northwestern State University | 6.2% | 21.8% | 28.0% |
| 0072 - University of New Orleans | 6.2% | 21.8% | 28.0% |
| 0075 - Nicholls State University | 6.2% | 21.8% | 28.0% |
| 0076 - Southeastern LA University | 6.2% | 21.8% | 28.0% |
| 0077 - University of Louisiana Lafayette | 6.2% | 21.8% | 28.0% |
| 0078 - Grambling State University | 6.2% | 21.8% | 28.0% |
| 0098 - McNeese State University | 6.2% | 21.8% | 28.0% |
| 0099 - University of Louisiana Monroe | 6.2% | 21.8% | 28.0% |
| 0343 - A.E. Phillips Lab School | 6.2% | 21.8% | 28.0% |
| 0345 - Northwestern Lab School | 6.2% | 21.8% | 28.0% |
| 0346 - Southeastern Lab School | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2020-21) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.2% | 21.8% | 28.0% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.2% | 21.8% | 28.0% |
| 0086 - Delgado | 6.2% | 21.8% | 28.0% |
| 0159 - Elaine Nunez Community College | 6.2% | 21.8% | 28.0% |
| 0242 - Bossier Parish Community College | 6.2% | 21.8% | 28.0% |
| 0250 - South Louisiana Community College | 6.2% | 21.8% | 28.0% |
| 0257 - Baton Rouge Community College | 6.2% | 21.8% | 28.0% |
| 0258 - River Parishes Community College | 6.2% | 21.8% | 28.0% |
| 0281 - Louisiana Delta Community College | 6.2% | 21.8% | 28.0% |
| The institutions listed below are not ORP-eligible employers, but may employ individuals who joined the ORP under an eligible employer. In these circumstances, the aforementioned individuals must remain in the ORP for all TRSL-eligible positions, and the contribution rates below are applicable. | | | |
| Other | 6.2% | 21.8% | 28.0% |
| 0091 - SOWELA Technical Community College | 6.2% | 21.8% | 28.0% |
| 0100 - L.E. Fletcher Technical Community College | 6.2% | 21.8% | 28.0% |
| 0176 - Northshore Technical Community College | 6.2% | 21.8% | 28.0% |
| 0183 - Northwest Louisiana Technical Community College | 6.2% | 21.8% | 28.0% |
| 0204 - Central Louisiana Technical Community College | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2019-20) | | | |
|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.2% | 22.2% | 28.4% |
| 0200 - Louisiana Board of Regents | 6.2% | 22.2% | 28.4% |
| Board of Supervisors of Louisiana State University | 6.2% | 22.2% | 28.4% |
| 0071 - LSU Baton Rouge | 6.2% | 22.2% | 28.4% |
| 0074 - LSU Medical Center New Orleans | 6.2% | 22.2% | 28.4% |
| 0149 - LSU Medical Center Shreveport | 6.2% | 22.2% | 28.4% |
| 0245 - Lallie Kemp Medical Center | 6.2% | 22.2% | 28.4% |
| 0277 - LSU Health Sciences Center | 6.2% | 22.2% | 28.4% |
| 0344 - LSU Lab School | 6.2% | 22.2% | 28.4% |
| Board of Supervisors of Southern University | 6.2% | 22.2% | 28.4% |
| 0079 - Southern University Baton Rouge | 6.2% | 22.2% | 28.4% |
| 0080 - Southern University New Orleans | 6.2% | 22.2% | 28.4% |
| 0136 - Southern University Shreveport/Bossier | 6.2% | 22.2% | 28.4% |
| 0347 - Southern Lab School | 6.2% | 22.2% | 28.4% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2019-20) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.2% | 22.2% | 28.4% |
| 0156 - Board of Supervisors University of Louisiana System | 6.2% | 22.2% | 28.4% |
| 0069 - Louisiana Tech | 6.2% | 22.2% | 28.4% |
| 0070 - Northwestern State University | 6.2% | 22.2% | 28.4% |
| 0072 - University of New Orleans | 6.2% | 22.2% | 28.4% |
| 0075 - Nicholls State University | 6.2% | 22.2% | 28.4% |
| 0076 - Southeastern LA University | 6.2% | 22.2% | 28.4% |
| 0077 - University of Louisiana Lafayette | 6.2% | 22.2% | 28.4% |
| 0078 - Grambling State University | 6.2% | 22.2% | 28.4% |
| 0098 - McNeese State University | 6.2% | 22.2% | 28.4% |
| 0099 - University of Louisiana Monroe | 6.2% | 22.2% | 28.4% |
| 0343 - A.E. Phillips Lab School | 6.2% | 22.2% | 28.4% |
| 0345 - Northwestern Lab School | 6.2% | 22.2% | 28.4% |
| 0346 - Southeastern Lab School | 6.2% | 22.2% | 28.4% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2019-20) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.2% | 22.2% | 28.4% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.2% | 22.2% | 28.4% |
| 0086 - Delgado | 6.2% | 22.2% | 28.4% |
| 0159 - Elaine Nunez Community College | 6.2% | 22.2% | 28.4% |
| 0242 - Bossier Parish Community College | 6.2% | 22.2% | 28.4% |
| 0250 - South Louisiana Community College | 6.2% | 22.2% | 28.4% |
| 0257 - Baton Rouge Community College | 6.2% | 22.2% | 28.4% |
| 0258 - River Parishes Community College | 6.2% | 22.2% | 28.4% |
| 0281 - Louisiana Delta Community College | 6.2% | 22.2% | 28.4% |
| The institutions listed below are not ORP-eligible employers, but may employ individuals who joined the ORP under an eligible employer. In these circumstances, the aforementioned individuals must remain in the ORP for all TRSL-eligible positions, and the contribution rates below are applicable. | | | |
| Other | 6.2% | 22.2% | 28.4% |
| 0091 - SOWELA Technical Community College | 6.2% | 22.2% | 28.4% |
| 0100 - L.E. Fletcher Technical College | 6.2% | 22.2% | 28.4% |
| 0176 - Northshore Technical Community College | 6.2% | 22.2% | 28.4% |
| 0183 - Northwest Technical College | 6.2% | 22.2% | 28.4% |
| 0204 - Central Louisiana Technical Community College | 6.2% | 22.2% | 28.4% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2018-19) | | | |
|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Regents | 6.2% | 21.8% | 28.0% |
| 0200 - Louisiana Board of Regents | 6.2% | 21.8% | 28.0% |
| Board of Supervisors of Louisiana State University | 6.2% | 21.8% | 28.0% |
| 0071 - LSU Baton Rouge | 6.2% | 21.8% | 28.0% |
| 0074 - LSU Medical Center New Orleans | 6.2% | 21.8% | 28.0% |
| 0149 - LSU Medical Center Shreveport | 6.2% | 21.8% | 28.0% |
| 0245 - Lallie Kemp Medical Center | 6.2% | 21.8% | 28.0% |
| 0277 - LSU Health Sciences Center | 6.2% | 21.8% | 28.0% |
| 0344 - LSU Lab School | 6.2% | 21.8% | 28.0% |
| Board of Supervisors of Southern University | 6.2% | 21.8% | 28.0% |
| 0079 - Southern University Baton Rouge | 6.2% | 21.8% | 28.0% |
| 0080 - Southern University New Orleans | 6.2% | 21.8% | 28.0% |
| 0136 - Southern University Shreveport/Bossier | 6.2% | 21.8% | 28.0% |
| 0347 - Southern Lab School | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2018-19) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 6.2% | 21.8% | 28.0% |
| 0156 - Board of Supervisors University of Louisiana System | 6.2% | 21.8% | 28.0% |
| 0069 - Louisiana Tech | 6.2% | 21.8% | 28.0% |
| 0070 - Northwestern State University | 6.2% | 21.8% | 28.0% |
| 0072 - University of New Orleans | 6.2% | 21.8% | 28.0% |
| 0075 - Nicholls State University | 6.2% | 21.8% | 28.0% |
| 0076 - Southeastern LA University | 6.2% | 21.8% | 28.0% |
| 0077 - University of Louisiana Lafayette | 6.2% | 21.8% | 28.0% |
| 0078 - Grambling State University | 6.2% | 21.8% | 28.0% |
| 0098 - McNeese State University | 6.2% | 21.8% | 28.0% |
| 0099 - University of Louisiana Monroe | 6.2% | 21.8% | 28.0% |
| 0343 - A.E. Phillips Lab School | 6.2% | 21.8% | 28.0% |
| 0345 - Northwestern Lab School | 6.2% | 21.8% | 28.0% |
| 0346 - Southeastern Lab School | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2018-19) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount* | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 6.2% | 21.8% | 28.0% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 6.2% | 21.8% | 28.0% |
| 0086 - Delgado | 6.2% | 21.8% | 28.0% |
| 0091 - SOWELA Technical Community College | 6.2% | 21.8% | 28.0% |
| 0100 - J.F. Fletcher Technical College | 6.2% | 21.8% | 28.0% |
| 0132 - South Central Louisiana Technical College | 6.2% | 21.8% | 28.0% |
| 0159 - Elaine Nunez Community College | 6.2% | 21.8% | 28.0% |
| 0176 - Northshore Technical Community College | 6.2% | 21.8% | 28.0% |
| 0183 - Northwest Technical College | 6.2% | 21.8% | 28.0% |
| 0204 - Central Louisiana Technical Community College | 6.2% | 21.8% | 28.0% |
| 0242 - Bossier Parish Community College | 6.2% | 21.8% | 28.0% |
| 0250 - South Louisiana Community College | 6.2% | 21.8% | 28.0% |
| 0257 - Baton Rouge Community College | 6.2% | 21.8% | 28.0% |
| 0258 - River Parishes Community College | 6.2% | 21.8% | 28.0% |
| 0281 - Louisiana Delta Community College | 6.2% | 21.8% | 28.0% |

*The Transfer Amount is applicable to all institutions or agencies under a higher education board's supervision or control, including laboratory schools, and is established by either board resolution or law.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2017-18) | | | |
|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Regents | 5.9459% | 22.2% | 28.1% |
| 0200 - Louisiana Board of Regents | 5.9459% | 22.2% | 28.1% |
| Board of Supervisors of Louisiana State University | 5.9459% | 22.2% | 28.1% |
| 0071 - LSU Baton Rouge | 5.9459% | 22.2% | 28.1% |
| 0074 - LSU Medical Center New Orleans | 5.9459% | 22.2% | 28.1% |
| 0129 - LSU Shreveport | 5.9459% | 22.2% | 28.1% |
| 0149 - LSU Medical Center Shreveport | 5.9459% | 22.2% | 28.1% |
| 0245 - Lallie Kemp Medical Center | 5.9459% | 22.2% | 28.1% |
| 0277 - LSU Health Sciences Center | 5.9459% | 22.2% | 28.1% |
| 0344 - LSU Lab School* | 5.9459% | 22.2% | 28.1% |
| Board of Supervisors of Southern University | 5.945975% | 22.2% | 28.1% |
| 0079 - Southern University Baton Rouge | 5.945975% | 22.2% | 28.1% |
| 0080 - Southern University New Orleans | 5.945975% | 22.2% | 28.1% |
| 0136 - Southern University Shreveport/Bossier | 5.945975% | 22.2% | 28.1% |
| 0347 - Southern Lab School* | 5.945975% | 22.2% | 28.1% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

Appendix F

TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2017-18) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 5.75% | 22.2% | 28.0% |
| 0156 - Board of Supervisors University of Louisiana System | 5.75% | 22.2% | 28.0% |
| 0069 - Louisiana Tech | 5.75% | 22.2% | 28.0% |
| 0070 - Northwestern State University | 5.75% | 22.2% | 28.0% |
| 0072 - University of New Orleans | 5.75% | 22.2% | 28.0% |
| 0075 - Nicholls State University | 5.75% | 22.2% | 28.0% |
| 0076 - Southeastern LA University | 5.75% | 22.2% | 28.0% |
| 0077 - University of Louisiana Lafayette | 5.75% | 22.2% | 28.0% |
| 0078 - Grambling State University | 5.75% | 22.2% | 28.0% |
| 0098 - McNeese State University | 5.75% | 22.2% | 28.0% |
| 0099 - University of Louisiana Monroe | 5.75% | 22.2% | 28.0% |
| 0343 - A.E. Phillips Lab School* | 5.75% | 22.2% | 28.0% |
| 0345 - Northwestern Lab School* | 5.75% | 22.2% | 28.0% |
| 0346 - Southeastern Lab School* | 5.75% | 22.2% | 28.0% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

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TRSL and ORP Historical Contribution Rates



| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2017-18) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 5.945975% | 22.2% | 28.1% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 5.945975% | 22.2% | 28.1% |
| 0086 - Delgado | 5.945975% | 22.2% | 28.1% |
| 0091 - SOWELA Technical Community College | 5.945975% | 22.2% | 28.1% |
| 0100 - J.F. Fletcher Technical College | 5.945975% | 22.2% | 28.1% |
| 0132 - South Central Louisiana Technical College | 5.945975% | 22.2% | 28.1% |
| 0159 - Elaine Nunez Community College | 5.945975% | 22.2% | 28.1% |
| 0176 - Northshore Technical Community College | 5.945975% | 22.2% | 28.1% |
| 0183 - Northwest Technical College | 5.945975% | 22.2% | 28.1% |
| 0204 - Central Louisiana Technical Community College | 5.945975% | 22.2% | 28.1% |
| 0242 - Bossier Parish Community College | 5.945975% | 22.2% | 28.1% |
| 0250 - South Louisiana Community College | 5.945975% | 22.2% | 28.1% |
| 0257 - Baton Rouge Community College | 5.945975% | 22.2% | 28.1% |
| 0258 - River Parishes Community College | 5.945975% | 22.2% | 28.1% |
| 0281 - Louisiana Delta Community College | 5.945975% | 22.2% | 28.1% |
| 0348 - LCTCS Online | 5.945975% | 22.2% | 28.1% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

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TRSL and ORP Historical Contribution Rates

HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2016-17)

| Management Board & Reporting Employers | Employer Rate (ER) | | |
|---|--------------------|--------------|--------------|
| | Transfer Amount | Shared UAL | Total ER |
| Board of Regents | 5.6919% | 21.2% | 26.9% |
| 0200 - Louisiana Board of Regents | 5.6919% | 21.2% | 26.9% |
| 0211 - Louisiana Universities Marine Consortium (LUMCON) | 5.6919% | 21.2% | 26.9% |
| Board of Supervisors of Louisiana State University | 5.6919% | 21.2% | 26.9% |
| 0071 - LSU Baton Rouge | 5.6919% | 21.2% | 26.9% |
| 0074 - LSU Medical Center New Orleans | 5.6919% | 21.2% | 26.9% |
| 0129 - LSU Shreveport | 5.6919% | 21.2% | 26.9% |
| 0149 - LSU Medical Center Shreveport | 5.6919% | 21.2% | 26.9% |
| 0232 - Huey P. Long Medical Center | 5.6919% | 21.2% | 26.9% |
| 0245 - Lallie Kemp Medical Center | 5.6919% | 21.2% | 26.9% |
| 0277 - LSU Health Sciences Center | 5.6919% | 21.2% | 26.9% |
| 0344 - LSU Lab School* | 5.6919% | 21.2% | 26.9% |
| Board of Supervisors of Southern University | 5.691995% | 21.2% | 26.9% |
| 0079 - Southern University Baton Rouge | 5.691995% | 21.2% | 26.9% |
| 0080 - Southern University New Orleans | 5.691995% | 21.2% | 26.9% |
| 0136 - Southern University Shreveport/Bossier | 5.691995% | 21.2% | 26.9% |
| 0347 - Southern Lab School* | 5.691995% | 21.2% | 26.9% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

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TRSL and ORP Historical Contribution Rates

| Higher Education Employers: ORP Contribution Rates (FY 2016-17) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 5.2545% | 21.2% | 26.5% |
| 0156 - Board of Supervisors University of Louisiana System | 5.2545% | 21.2% | 26.5% |
| 0069 - Louisiana Tech | 5.2545% | 21.2% | 26.5% |
| 0070 - Northwestern State University | 5.2545% | 21.2% | 26.5% |
| 0072 - University of New Orleans | 5.2545% | 21.2% | 26.5% |
| 0075 - Nicholls State University | 5.2545% | 21.2% | 26.5% |
| 0076 - Southeastern LA University | 5.2545% | 21.2% | 26.5% |
| 0077 - University of Louisiana Lafayette | 5.2545% | 21.2% | 26.5% |
| 0078 - Grambling State University | 5.2545% | 21.2% | 26.5% |
| 0098 - McNeese State University | 5.2545% | 21.2% | 26.5% |
| 0099 - University of Louisiana Monroe | 5.2545% | 21.2% | 26.5% |
| 0342 - Alma I. Brown Lab School* | 5.2545% | 21.2% | 26.5% |
| 0343 - A.E. Phillips Lab School* | 5.2545% | 21.2% | 26.5% |
| 0345 - Northwestern Lab School* | 5.2545% | 21.2% | 26.5% |
| 0346 - Southeastern Lab School* | 5.2545% | 21.2% | 26.5% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2016-17) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 5.691995% | 21.2% | 26.9% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 5.691995% | 21.2% | 26.9% |
| 0086 - Delgado | 5.691995% | 21.2% | 26.9% |
| 0091 - SOWELA Technical Community College | 5.691995% | 21.2% | 26.9% |
| 0100 - L.E. Fletcher Technical College | 5.691995% | 21.2% | 26.9% |
| 0132 - South Central Louisiana Technical College | 5.691995% | 21.2% | 26.9% |
| 0159 - Elaine Nunez Community College | 5.691995% | 21.2% | 26.9% |
| 0176 - Northshore Technical Community College | 5.691995% | 21.2% | 26.9% |
| 0183 - Northwest Technical College | 5.691995% | 21.2% | 26.9% |
| 0204 - Central Louisiana Technical Community College | 5.691995% | 21.2% | 26.9% |
| 0242 - Bossier Parish Community College | 5.691995% | 21.2% | 26.9% |
| 0250 - South Louisiana Community College | 5.691995% | 21.2% | 26.9% |
| 0257 - Baton Rouge Community College | 5.691995% | 21.2% | 26.9% |
| 0258 - River Parishes Community College | 5.691995% | 21.2% | 26.9% |
| 0281 - Louisiana Delta Community College | 5.691995% | 21.2% | 26.9% |
| 0348 - LCTCS Online | 5.691995% | 21.2% | 26.9% |

Appendix F

TRSL and ORP Historical Contribution Rates

HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2015-16)

| Management Board & Reporting Employers | Employer Rate (ER) | | |
|---|--------------------|--------------|--------------|
| | Transfer Amount | Shared UAL | Total ER |
| Board of Regents | 5.4379% | 22.0% | 27.4% |
| 0200 - Louisiana Board of Regents | 5.4379% | 22.0% | 27.4% |
| 0211 - Louisiana Universities Marine Consortium (LUMCON) | 5.4379% | 22.0% | 27.4% |
| Board of Supervisors of Louisiana State University | 5.4379% | 22.0% | 27.4% |
| 0071 - LSU Baton Rouge | 5.4379% | 22.0% | 27.4% |
| 0074 - LSU Medical Center New Orleans | 5.4379% | 22.0% | 27.4% |
| 0129 - LSU Shreveport | 5.4379% | 22.0% | 27.4% |
| 0149 - LSU Medical Center Shreveport | 5.4379% | 22.0% | 27.4% |
| 0232 - Huey P. Long Medical Center | 5.4379% | 22.0% | 27.4% |
| 0245 - Lallie Kemp Medical Center | 5.4379% | 22.0% | 27.4% |
| 0277 - LSU Health Sciences Center | 5.4379% | 22.0% | 27.4% |
| 0344 - LSU Lab School* | 5.4379% | 22.0% | 27.4% |
| Board of Supervisors of Southern University | 5.437925% | 22.0% | 27.4% |
| 0079 - Southern University Baton Rouge | 5.437925% | 22.0% | 27.4% |
| 0080 - Southern University New Orleans | 5.437925% | 22.0% | 27.4% |
| 0136 - Southern University Shreveport/Bossier | 5.437925% | 22.0% | 27.4% |
| 0347 - Southern Lab School* | 5.437925% | 22.0% | 27.4% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2015-16) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 5.2545% | 22.0% | 27.3% |
| 0156 - Board of Supervisors University of Louisiana System | 5.2545% | 22.0% | 27.3% |
| 0069 - Louisiana Tech | 5.2545% | 22.0% | 27.3% |
| 0070 - Northwestern State University | 5.2545% | 22.0% | 27.3% |
| 0072 - University of New Orleans | 5.2545% | 22.0% | 27.3% |
| 0075 - Nicholls State University | 5.2545% | 22.0% | 27.3% |
| 0076 - Southeastern LA University | 5.2545% | 22.0% | 27.3% |
| 0077 - University of Louisiana Lafayette | 5.2545% | 22.0% | 27.3% |
| 0078 - Grambling State University | 5.2545% | 22.0% | 27.3% |
| 0098 - McNeese State University | 5.2545% | 22.0% | 27.3% |
| 0099 - University of Louisiana Monroe | 5.2545% | 22.0% | 27.3% |
| 0342 - Alma I. Brown Lab School* | 5.2545% | 22.0% | 27.3% |
| 0343 - A.E. Phillips Lab School* | 5.2545% | 22.0% | 27.3% |
| 0345 - Northwestern Lab School* | 5.2545% | 22.0% | 27.3% |
| 0346 - Southeastern Lab School* | 5.2545% | 22.0% | 27.3% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2015-16) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 5.437925% | 22.0% | 27.4% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 5.437925% | 22.0% | 27.4% |
| 0086 - Delgado | 5.437925% | 22.0% | 27.4% |
| 0091 - SOWELA Technical Community College | 5.437925% | 22.0% | 27.4% |
| 0100 - L.E. Fletcher Technical College | 5.437925% | 22.0% | 27.4% |
| 0132 - South Central Louisiana Technical College | 5.437925% | 22.0% | 27.4% |
| 0159 - Elaine Nunez Community College | 5.437925% | 22.0% | 27.4% |
| 0176 - Northshore Technical Community College | 5.437925% | 22.0% | 27.4% |
| 0183 - Northwest Technical College | 5.437925% | 22.0% | 27.4% |
| 0204 - Central Louisiana Technical Community College | 5.437925% | 22.0% | 27.4% |
| 0242 - Bossier Parish Community College | 5.437925% | 22.0% | 27.4% |
| 0250 - South Louisiana Community College | 5.437925% | 22.0% | 27.4% |
| 0257 - Baton Rouge Community College | 5.437925% | 22.0% | 27.4% |
| 0258 - River Parishes Community College | 5.437925% | 22.0% | 27.4% |
| 0281 - Louisiana Delta Community College | 5.437925% | 22.0% | 27.4% |
| 0348 - LCTCS Online | 5.437925% | 22.0% | 27.4% |

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2014-15) | | | |
|---|--------------------|--------------|--------------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Regents | 5.1839% | 22.7% | 27.9% |
| 0200 - Louisiana Board of Regents | 5.1839% | 22.7% | 27.9% |
| 0211 - Louisiana Universities Marine Consortium (LUMCON) | 5.1839% | 22.7% | 27.9% |
| Board of Supervisors of Louisiana State University | 5.1839% | 22.7% | 27.9% |
| 0071 - LSU Baton Rouge | 5.1839% | 22.7% | 27.9% |
| 0074 - LSU Medical Center New Orleans | 5.1839% | 22.7% | 27.9% |
| 0129 - LSU Shreveport | 5.1839% | 22.7% | 27.9% |
| 0149 - LSU Medical Center Shreveport | 5.1839% | 22.7% | 27.9% |
| 0225 - E.A. Conway Medical Center | 5.1839% | 22.7% | 27.9% |
| 0232 - Huey P. Long Medical Center | 5.1839% | 22.7% | 27.9% |
| 0239 - Washington St. Tammany Medical Center | 5.1839% | 22.7% | 27.9% |
| 0245 - Lallie Kemp Medical Center | 5.1839% | 22.7% | 27.9% |
| 0277 - LSU Health Sciences Center | 5.1839% | 22.7% | 27.9% |
| 0344 - LSU Lab School* | 5.1839% | 22.7% | 27.9% |
| Board of Supervisors of Southern University | 5.1839% | 22.7% | 27.9% |
| 0079 - Southern University Baton Rouge | 5.1839% | 22.7% | 27.9% |
| 0080 - Southern University New Orleans | 5.1839% | 22.7% | 27.9% |
| 0136 - Southern University Shreveport/Bossier | 5.1839% | 22.7% | 27.9% |
| 0347 - Southern Lab School** | 5.8216% | 22.7% | 28.5% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.

**The rate for institutions whose governing boards did not set a rate by resolution is the rate paid in the previous fiscal year.

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2014-15) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of the University of Louisiana System | 5.2545% | 22.7% | 28.0% |
| 0156 - Board of Supervisors University of Louisiana System | 5.2545% | 22.7% | 28.0% |
| 0069 - Louisiana Tech | 5.2545% | 22.7% | 28.0% |
| 0070 - Northwestern State University | 5.2545% | 22.7% | 28.0% |
| 0072 - University of New Orleans | 5.2545% | 22.7% | 28.0% |
| 0075 - Nicholls State University | 5.2545% | 22.7% | 28.0% |
| 0076 - Southeastern LA University | 5.2545% | 22.7% | 28.0% |
| 0077 - University of Louisiana Lafayette | 5.2545% | 22.7% | 28.0% |
| 0078 - Grambling State University | 5.2545% | 22.7% | 28.0% |
| 0098 - McNeese State University | 5.2545% | 22.7% | 28.0% |
| 0099 - University of Louisiana Monroe | 5.2545% | 22.7% | 28.0% |
| 0342 - Alma I. Brown Lab School* | 5.2545% | 22.7% | 28.0% |
| 0343 - A.E. Phillips Lab School* | 5.2545% | 22.7% | 28.0% |
| 0345 - Northwestern Lab School* | 5.2545% | 22.7% | 28.0% |
| 0346 - Southeastern Lab School* | 5.2545% | 22.7% | 28.0% |

*Laboratory schools use rate designated by their governing board, if the rate is set by resolution.
**The rate for institutions whose governing boards did not set a rate by resolution is the rate paid in the previous fiscal year.

Appendix F

TRSL and ORP Historical Contribution Rates

| HIGHER EDUCATION EMPLOYERS: ORP Contribution Rates (FY 2014-15) | | | |
|---|--------------------|------------|----------|
| Management Board & Reporting Employers | Employer Rate (ER) | | |
| | Transfer Amount | Shared UAL | Total ER |
| Board of Supervisors of Community & Technical Colleges | 5.1839% | 22.7% | 27.9% |
| 0259 - Louisiana Community & Technical College System (LCTCS) | 5.1839% | 22.7% | 27.9% |
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| 0176 - Northshore Technical Community College | 5.1839% | 22.7% | 27.9% |
| 0183 - Northwest Technical College | 5.1839% | 22.7% | 27.9% |
| 0204 - Central Louisiana Technical Community College | 5.1839% | 22.7% | 27.9% |
| 0242 - Bossier Parish Community College | 5.1839% | 22.7% | 27.9% |
| 0250 - South Louisiana Community College | 5.1839% | 22.7% | 27.9% |
| 0257 - Baton Rouge Community College | 5.1839% | 22.7% | 27.9% |
| 0258 - River Parishes Community College | 5.1839% | 22.7% | 27.9% |
| 0281 - Louisiana Delta Community College | 5.1839% | 22.7% | 27.9% |
| 0348 - LCTCS Online | 5.1839% | 22.7% | 27.9% |

Appendix F

TRSL and ORP Historical Contribution Rates

| ORP Contribution Rates (FY 2013-14 through FY 2012-2013)* | | | | | | | | |
|---|---------------|---------------------|----------|--------------|-----------------------|------------|----------------|---|
| Fiscal Year | ORP Plans | Member Contribution | | | Employer Contribution | | | Total Percentage Transferred to Carrier |
| | | Member Rate | TRSL Fee | Total Member | Normal Cost | Shared UAL | Total Employer | |
| 2013-14 | K-12 ORP | 7.95% | 0.05% | 8.00% | 5.8216% | 21.3% | 27.2%** | 13.772% |
| | Higher Ed ORP | 7.95% | 0.05% | 8.00% | 5.1839% | 21.3% | 26.5% | 13.134% |
| 2012-13 | K-12 ORP | 7.95% | 0.05% | 8.00% | 5.798% | 18.702% | 24.5% | 13.748% |
| | Higher Ed ORP | 7.95% | 0.05% | 8.00% | 5.685% | 18.715% | 24.4% | 13.635% |

*Act 716 of the 2012 legislative session calls for the calculation of individualized employer contribution rates for K-12 ORP employers and higher ed ORP employers. (Effective FY 2012-2013 and thereafter)

**Rounded

| ORP Contribution Rates (FY 2011-2012 through FY 1990-1991) | | | | | | | |
|--|---------------------|----------|--------------|-----------------------|--------------------|----------------|---|
| Fiscal Year | Member Contribution | | | Employer Contribution | | | Total Percentage Transferred to Carrier |
| | Member Rate | TRSL Fee | Total Member | Normal Cost | Unfunded Liability | Total Employer | |
| 2011-12 | 7.95% | 0.05% | 8.00% | 5.97% | 17.73% | 23.70% | 13.92% |
| 2010-11 | 7.90% | 0.10% | 8.00% | 5.70% | 14.50% | 20.20% | 13.60% |
| 2009-10 | 7.90% | 0.10% | 8.00% | 5.76% | 9.74% | 15.50% | 13.66% |
| 2008-09 | 7.90% | 0.10% | 8.00% | 6.95% | 8.55% | 15.50% | 14.85% |
| 2007-08 | 7.90% | 0.10% | 8.00% | 6.93% | 9.67% | 16.60% | 14.83% |
| 2006-07 | 7.90% | 0.10% | 8.00% | 6.64% | 9.16% | 15.80% | 14.54% |
| 2005-06 | 7.90% | 0.10% | 8.00% | 6.51% | 9.39% | 15.90% | 14.41% |
| 2004-05 | 7.90% | 0.10% | 8.00% | 6.26% | 9.24% | 15.50% | 14.16% |
| 2003-04 | 7.90% | 0.10% | 8.00% | 6.71% | 7.09% | 13.80% | 14.61% |
| 2002-03 | 7.90% | 0.10% | 8.00% | 6.75% | 6.35% | 13.10% | 14.65% |
| 2001-02 | 7.90% | 0.10% | 8.00% | 6.77% | 6.33% | 13.10% | 14.67% |

Appendix F

TRSL and ORP Historical Contribution Rates

| ORP Contribution Rates (FY 2011-2012 through FY 1990-1991) | | | | | | | |
|--|---------------------|----------|--------------|-----------------------|--------------------|----------------|---|
| Fiscal Year | Member Contribution | | | Employer Contribution | | | Total Percentage Transferred to Carrier |
| | Member Rate | TRSL Fee | Total Member | Normal Cost | Unfunded Liability | Total Employer | |
| 2000-01 | 7.90% | 0.10% | 8.00% | 6.86% | 7.34% | 14.20% | 14.76% |
| 1999-00 | 7.90% | 0.10% | 8.00% | 6.93% | 8.27% | 15.20% | 14.83% |
| 1998-99 | 7.90% | 0.10% | 8.00% | 7.03% | 9.47% | 16.50% | 14.93% |
| 1997-98 | 7.90% | 0.10% | 8.00% | 7.02% | 9.38% | 16.40% | 14.92% |
| 1996-97 | 7.90% | 0.10% | 8.00% | 6.96% | 9.34% | 16.30% | 14.86% |
| 1995-96 | 7.90% | 0.10% | 8.00% | 7.09% | 9.41% | 16.50% | 14.99% |
| 1994-95 | 7.90% | 0.10% | 8.00% | 6.87% | 9.33% | 16.20% | 14.77% |
| 1993-94 | 7.90% | 0.10% | 8.00% | 6.81% | 9.39% | 16.20% | 14.71% |
| 1992-93 | 7.90% | 0.10% | 8.00% | 6.73% | 9.67% | 16.40% | 14.63% |
| 1991-92 | 7.90% | 0.10% | 8.00% | 6.57% | 10.73% | 17.30% | 14.47% |
| 1990-91 | 7.90% | 0.10% | 8.00% | 5.97% | 7.83% | 13.80% | 13.87% |



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Board of Regents Meeting as a Committee of the Whole

Agenda

Facilities and Property

Tuesday, January 28, 2025

11:25 AM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

IX. Reports and Recommendations

C. Facilities and Property

1. Consent Agenda

a. Small Capital Projects Report

- i. LSU A&M: East Campus Apartments Boiler Replacements
- ii. LSU A&M: Howe-Russell Suites W0151 and W0153 Renovations
- iii. LSU A&M: Renewable Natural Resources Building Interior Painting
- iv. LSU A&M: SVM Large Animal Hospital Floor Refinishing
- v. LSU A&M: SVM Main Building Energy Efficiency Lighting Replacement

2. Additions to BOR FY 2025–26 Capital Outlay Budget

AGENDA ITEM IX.C.1.
Consent Agenda

a. Small Capital Projects Report

In accordance with the Board of Regents' Facilities Policy, small capital project proposals are reviewed by staff, approved where appropriate, and thereafter reported at the next meeting of the Facilities and Property Committee. Pursuant to R.S. 39:128, Board of Regents (BOR) staff may internally approve small capital projects ranging from \$175,000 to \$1,000,000 and report these approvals to the Board during a subsequent meeting.

All projects were approved by their respective systems or management boards and submitted for consideration. Staff approved the following small capital projects since the previous report:

i. Louisiana State University and A&M College (LSU): East Campus Apartments Boiler Replacement – Baton Rouge, LA

LSU's East Campus Apartments use three boilers to provide domestic hot water for the housing facilities. Two of the three boilers have failed, and the institution is using a rental boiler to provide sufficient hot water for the apartments. The project scope involves replacing the two failed boilers with new units. **The total project cost of \$197,000 will be funded with auxiliary revenues.**

ii. Louisiana State University and A&M College: Howe-Russell Suites W0151 and W0153 Renovations – Baton Rouge, LA

This project will renovate existing underutilized space within LSU's Howe Russell Hall for use as a Humanities Center. The new space will be able to host small lectures and conferences. The project scope includes demolition of the existing plaster and terra cotta block partitions, abatement, new finishes throughout, installation of a new storefront system, LED lighting, power, data cabling, and pathway. The project also modifies the existing HVAC system, updates the controls, and modifies the plumbing to provide a new sink located at the food preparation counter. **The project renovates approximately 812 square feet (SF) of space at a cost of \$222.95/SF, for a total project cost of \$180,000. The project will be funded with operational funds.**

iii. Louisiana State University and A&M College: Renewable Natural Resources (RNR) Building Interior Painting – Baton Rouge, LA

The peeling and chipping paint within LSU's RNR building is original to the building. This project will repaint the interior of the 70,000 SF facility. The project scope involves patching all holes and cracks, sealing and prepping the walls, and repainting all walls and trim. **The total project cost of \$200,000 will be funded with operational funds.**

**iv. Louisiana State University and A&M College: School of Veterinary Medicine
(SVM) Large Animal Hospital Floor Refinishing – Baton Rouge, LA**

The floors within the walkways of LSU's SVM Large Animal Hospital are deteriorated and slippery which is a concern for staff, horses, and cattle that use the facility. This project will provide a new finish for the floor to optimally provide slip coefficient, antimicrobial properties, and non-porosity to meet Louisiana Veterinary Medical Association standards. **The total project cost of \$200,000 will be funded with operational funds.**

**v. Louisiana State University and A&M College: School of Veterinary Medicine Main
Building Energy Efficiency Lighting Replacement – Baton Rouge, LA**

This project will reduce the amount of electrical energy used by LSU's SVM which will allow funds formerly used for building electricity to be used for academic purposes. The project will replace existing inefficient fluorescent and high-intensity discharge (HID) fixtures with energy efficient LED fixtures. The project will also add occupancy controls to the spaces within the facility. **The total project cost of \$700,000 will be funded through an Energy Efficiency grant from the Louisiana Public Service Commission.**

STAFF RECOMMENDATION

Senior Staff recommends approval of the consent agenda, including the small capital projects report, as presented.

AGENDA ITEM IX.C.2.

Additions to Board of Regents (BOR) FY 2025–26 Capital Outlay Budget Recommendation

The BOR received requests from the University of Louisiana and Southern University Systems to add three projects to the FY 2025–26 Capital Outlay Budget Recommendation approved by the Board during the October 2024 meeting. All three projects were presumed to be fully funded at the time of the October Board approval.

The first two projects involve the replacement of Louisiana Tech University's (La Tech) central steam generator and construction of the Athletic Academic Center. Both projects bid in late 2024 and were substantially over budget. Value engineering efforts to proceed with the central steam generator project within the current available funds have been unsuccessful. La Tech is requesting to increase the current appropriation by \$2.5M during the upcoming 2025 Louisiana Regular Session so this project may be re-bid next fiscal year. The Athletic Academic Center is currently being value engineered to determine if an agreed upon scope of work may be accomplished with the current funding available. If the project is not able to proceed with current available funding, the project will require a yet to be determined additional amount of funding during the upcoming session. The central steam generator project is fully funded with state dollars while the Academic Athletic Center is funded with a combination of state dollars and self-generated revenues (private donations).

The final project involves the Southern University Law Center's (SULC) construction of a new Law Center Annex adjacent to the current Law Center facility on the main campus. The current budget is \$1.6M funded entirely with self-generated revenues (Federal Title III funding). During the design process, the architects have estimated the total project cost to be \$800K more than the current appropriation. The SULC requests increasing the current appropriation so this project may proceed to bidding in the coming months. The increased funding will be derived from self-generated revenues.

STAFF RECOMMENDATION

Senior Staff recommends approval of the addition of three projects to the Board of Regents' Fiscal Year 2025–26 Capital Outlay Budget Recommendation as presented.



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Board of Regents Meeting as a Committee of the Whole

Agenda

Academic and Student Affairs

Tuesday, January 28, 2025

12:30 PM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

IX. Reports and Recommendations

D. Academic and Student Affairs

1. Academic Programs

- a. AAS Radiologic Technology – Fletcher Technical Community College
- b. AAS Respiratory Care – SOWELA Technical Community College
- c. AAS Patient Navigator – Northshore Technical Community College
- d. BA Digital Media Arts – Southern University and A&M College

2. New Research Center

- a. NCI Designation Update and Approval of Center for Comparative Oncology – Louisiana State University A&M

3. Other Business

AGENDA ITEM IX.D.1.a

Proposed Associate of Applied Science in Radiologic Technology Fletcher Technical Community College

Background Information

Fletcher Technical Community College (FTCC) has requested the Board of Regents' approval to offer an Associate of Applied Science (AAS) in Radiologic Technology. The program proposal was approved by the Louisiana Community and Technical College System (LCTCS) Board of Supervisors and submitted to the Board of Regents for consideration. The proposal was then favorably reviewed by Chief Academic Officers statewide.

Staff Summary

The proposed AAS in Radiologic Technology will allow students the opportunity to master the skills necessary to fulfill the responsibilities of an entry-level radiographer and radiologic technologist. The program will enable students to acquire both didactic and clinical skills necessary for the Registered Radiologic Technician exam through the American Registry of Radiologic Technologists. Students will gain skills such as facilitating the proper use of appropriate radiation safety, producing high-quality diagnostic images, and optimizing patient care. The proposed program will be required to seek accreditation through the Joint Review Committee on Education in Radiologic Technology (JRCERT), which opens access to higher levels of training for students interested in careers in the radiology field.

1. **Value:** Per Regents' policy, this program meets the criteria of a Quality Credential of Value.
 - a. **Workforce Demand and Job Opportunities:** According to Lightcast data, the expected demand in the next ten years for Radiologic Technologies statewide and specifically in Louisiana Regional Labor Market Area (RLMA) 3 (Assumption, Lafourche, and Terrebonne parishes) will increase by 9 percent.

| Occupation | LWC Star Rating ¹ | Current Jobs ² | Projected Jobs 2034 ² | % Change ² | Average Salary ² |
|--|------------------------------|---------------------------|----------------------------------|-----------------------|-----------------------------|
| Radiologic Technologists (RLMA 3) | 4-star | 129 | 140 | 9% | \$57,000 |
| Radiologic Technologists (State of Louisiana) | 4-star | 3,270 | 3,561 | 9% | \$61,000 |

¹Source – LWC

²Source – Lightcast

- b. **Curriculum Alignment with Employer Needs:** The program was developed in response to industry and community needs. Hospital industry partners expressed the need for trained personnel in Radiologic Technology. The proposed curriculum provides students with skilled training and hands-on instruction. Each major course in the program is aligned with specific learning outcomes that will allow graduates to sit for national board certification. Once certified, individuals can continue their education to obtain more specialized radiography certifications in mammography and MRI.
- c. **Same or Similar In-state Programs:** Although there are similar AAS programs that have been implemented around the state, the nearest Radiologic Technology AAS program is offered at Delgado Community College, which is over 58 miles away. This program will specifically serve students located in the southeast region of Louisiana.
- d. **Student Enrollment and Completion:** Upon admission to FTCC, students will choose the General Studies:

Radiologic Technology track as their major. Once the student has completed 20 credit hours of general education courses with a grade point average of at least 2.75 and achieved a score of at least seventy-percent (75%) on the Health Education Systems (HESI) exam, they are considered for clinical admission. Enrollment estimates are based on conversations with current and prospective students who have expressed interest in the proposed program.

| | Year 1 | Year 2 | Year 3 | Year 4 |
|------------------------------------|--------|--------|--------|--------|
| TOTAL Estimated Program Enrollment | 20 | 40 | 50 | 50 |
| TOTAL Estimated Program Graduates | 0 | 10 | 20 | 20 |

2. Resources: The AAS in Radiologic Technology will require the addition of a full-time Program Director position and one adjunct instructor. FTCC is actively pursuing grant funding through the Blue Cross and Blue Shield Foundation and the Health Care Employment Reinvestment Opportunity (H.E.R.O.) Fund. Additionally, funds received from the Expanding Louisiana's Health Care Workforce Fund will be used toward equipment and other implementation startup costs.

| | Current | Needed | Additional Costs |
|--|---|--|-------------------------------------|
| Faculty | Program can be implemented with current general education faculty. | A Program Director and adjunct instructor will be hired over the next two years. | Yr. 1: \$75,000 Yr. 2: \$112,500 |
| Physical (Facilities, Equipment, Library, & Technology) | Existing facilities are adequate to support the program. | Positioning beds and mock equipment will be needed to begin the program. | Yr. 1: \$80,000 |
| Student Support | Existing resources will meet the needs of the program for the foreseeable future. | No additional resources are needed. | \$0 |

3. Master Plan Priorities: The following aspects of the proposal directly address priorities or goals of the statewide attainment goal and 2030 Master Plan.

- **Accessibility:** FTCC will deliver the clinical and general education portion via hybrid format. This will allow more flexibility for working-age adults with full-time jobs to enroll in and complete the program, especially for individuals in the rural areas of South Louisiana.
- **Affordability:** Open Education Resources (OER) have been adopted throughout the general education curriculum. The First Day Access program will provide digital access to required course materials through Canvas at a reduced price to ensure access to required textbooks on or before the first day of classes. The students can use TOPS Tech, MJ Foster, Pell Grants, and loans for this program.
- **Partnerships:** The proposed program is being offered in partnership with Cardiovascular Institute of the South, Terrebonne General Health Systems, Ochsner Health Systems, Ochsner Bayou Region, and Thibodaux Regional Health Systems to provide laboratory and clinical spaces.
- **Work-based learning:** Students will be involved in practicum experiences at several local hospital facilities. Although students are not being paid for these experiences, they will be working alongside registered radiologic technicians.
- **Other program attributes that contribute to closing the achievement gap with underserved populations:** Many students in the local community who live in low-income areas have shown interest in this program, but the closest college offering the program is nearly an hour from their homes. The proposed program will provide an opportunity for those underserved populations to receive education in this high-demand field. The hybrid course design will assist adult learners by

allowing them to maintain employment while continuing with lifelong learning.

Staff Analysis

The proposed AAS in Radiologic Technology was developed to prepare students interested in a career as an entry-level radiographer with the knowledge and skills necessary for successful completion of the Registered Radiologic Technician exam. The program will expand employment opportunities with greater earning potential and career advancement and specializations in the field while also serving to fill regional and state workforce needs for residents in the region.

STAFF RECOMMENDATION

Senior Staff recommends conditional approval of the proposed AAS in Radiologic Technology (CIP 51.0911) at Fletcher Technical Community College, with a progress report on program implementation submitted as part of the institution's 2025 Academic Plan.

AGENDA ITEM IX.D.1.b.

Proposed Associate of Applied Science in Respiratory Care SOWELA Technical Community College

Background Information

SOWELA Technical Community College (SOWELA) requests Board of Regents' approval to offer an Associate of Applied Science (AAS) in Respiratory Care. The proposal was approved by the Louisiana Community and Technical College System (LCTCS) Board of Supervisors and submitted to Regents for consideration. The proposal was then favorably reviewed by Chief Academic Officers statewide.

Staff Summary

SOWELA was approached in January 2020 by Lake Charles Memorial Hospital and again in 2021 by Christus St. Patrick Hospital, two of the institution's local healthcare partners, to start a Respiratory Therapy Program. When the initial request was made, the accrediting body, Commission on Accreditation for Respiratory Care (CoARC), was not accrediting associate degree programs. In December 2021, CoARC voted to allow associate program accreditation. The proposed AAS in Respiratory Care will prepare entry-level Respiratory Therapists and will address the increasing demand for Registered Respiratory Therapists in the region. The program will be accredited by CoARC, which will make graduates eligible to sit for the National Board for Respiratory Care (NBRC) credential examination.

1. **Value:** Per Regent's policy, this program meets the criteria of a Quality Credential of Value.
 - a. **Workforce Demand and Job Opportunities:** Local healthcare providers have identified a need for additional Respiratory Therapists in the region. The development of this program will help meet the needs of SOWELA's industry partners while offering a degree program locally that will lead to a high wage-earning career. The proposed degree will provide students the opportunity to participate in experiential learning opportunities at local hospitals potentially leading to employment with those hospitals upon graduation. The employment data below is representative of Regional Labor Market Area (RLMA) 5, where SOWELA is located.

| Occupation | LWC Star Rating ¹ | Current Jobs ² | Projected Jobs 2034 ² | % Change ² | Average Salary ² |
|-----------------------|------------------------------|---------------------------|----------------------------------|-----------------------|-----------------------------|
| Respiratory Therapist | 5-star | 126 | 145 | 15% | \$71,510 |

¹Source – LWC

²Source – Lightcast

- b. **Curriculum Alignment with Employer Needs:** The program's curriculum was designed with input from regional healthcare administrators and hospital partners.
- c. **Same or Similar In-State Programs:** Currently, the in-state respiratory program closest to Lake Charles is at Louisiana State University Eunice which is 47 miles away. With SOWELA located within a 15-mile radius of four hospitals, these healthcare partners would be able to support learning opportunities for students enrolled in the proposed program.
- d. **Student Enrollment and Completion:** As an extension to SOWELA's current Nursing and Allied Health program, the proposed AAS in Respiratory Care will provide an additional avenue for students who desire a healthcare pathway.

| | Year 1 | Year 2 | Year 3 | Year 4 |
|------------------------------------|--------|--------|--------|--------|
| TOTAL Estimated Program Enrollment | 15 | 27 | 27 | 27 |
| TOTAL Estimated Program Graduates | 0 | 12 | 12 | 12 |

2. Resources: The AAS in Respiratory Care will require one new full-time Program Director position, as well as one additional full-time Clinical Education Director. In addition, the Calcasieu building, which will house the program, was damaged during Hurricane Laura in 2020 and is in the process of being renovated. SOWELA received approximately \$900K in funding through the Expanding Louisiana's Health Care Workforce Fund which will be used to support the proposed program. In addition, SOWELA has historically received funds from a private donor in support of technology and equipment needs for their nursing and allied healthcare programs. These private grant funds average \$195K annually, but additional funds can be requested if needed.

| | Current | Needed | Additional Costs |
|--|--|--|--|
| Faculty | Existing faculty currently teaching general education courses will support the program. | Program Director, Clinical Education Director, and new faculty will be hired for the Respiratory Care courses. | Yr. 1: \$52,000 Yr. 2: \$184,000 Yrs. 3+: \$259,000 |
| Physical (Facilities, Equipment, Library, & Technology) | Renovations are currently underway in the building that will house the proposed program. | Several pieces of training technology and equipment will be needed. | Yr. 1: \$429,000 Yr. 2: \$203,000 Yrs. 3+: \$277,000 |
| Student Support | Existing resources will meet the needs of the program for the foreseeable future. | No additional resources projected. | \$0 |

3. Master Plan Priorities: The following aspects of the proposal directly address priorities or goals of the statewide attainment goal and 2030 Master Plan.

- **Accessibility:** SOWELA will offer general education courses in a variety of formats. The respiratory care portion of the program will be delivered using 100% face-to-face format only.
- **Affordability:** Open Education Resources (OER) resources have been implemented throughout the general education curriculum. In addition, SOWELA offers Prior Learning Assessment (PLA) credit options, allowing students the opportunity to earn college credit for knowledge and skills attained through educational or work experiences.
- **Partnerships:** SOWELA plans to expand upon already established industry partnerships with healthcare agencies like Lake Charles Memorial Hospital and Christus Ochsner St. Patrick Hospital, allowing Respiratory Care students to gain clinical experience at their facilities.
- **Work-based Learning:** Industry healthcare partners will help provide clinical instruction. Students are also required to complete community service hours with each semester of Respiratory Care courses.
- **Other program attributes that contribute to closing the achievement gap with underserved populations:** The AAS in Respiratory Care is designed to educate and support a diverse student population through its open access and noncompetitive admission process, providing all students access to a career in healthcare. SOWELA provides support services to encourage, promote, and motivate all students toward successful completion of their educational and career goals.

Staff Analysis

The proposed AAS in Respiratory Care was developed in response to demand from regional healthcare partners for more qualified Respiratory Therapists in Southwest Louisiana. Healthcare-related occupations remain in the top tier of need in recent labor market analysis data in RLMA 5, where SOWELA is located. The proposed program will expand opportunities for students in the region to enter healthcare professions.

STAFF RECOMMENDATION

Senior Staff recommends conditional approval of the proposed Associate of Applied Science in Respiratory Care (CIP 51.0908) at SOWELA Technical Community College, with a progress report on program implementation submitted as part of the institution's 2025 Academic Plan.

AGENDA ITEM IX.D.1.c.

Proposed Associate of Applied Science in Patient Navigator Northshore Technical Community College

Background Information

Northshore Technical Community College (NTCC) requests Board of Regents' approval to offer an Associate of Applied Science (AAS) in Patient Navigator. The proposal was approved by the Louisiana Community and Technical College System (LCTCS) Board of Supervisors and then submitted to Regents for consideration. The proposal was then favorably reviewed by Chief Academic Officers statewide.

Staff Summary

Assisting patients in navigating the healthcare system as a specific professional role, along with the title "Patient Navigator" has gained significant traction and recognition in recent years, particularly with the implementation of the Affordable Care Act. The healthcare industry has experienced a growing demand for Patient Navigators who function as guides for patients within the healthcare system to address patient needs and improve access to care. A Patient Navigator helps patients navigate complex processes like scheduling appointments, understanding diagnoses, accessing treatment options, managing financial concerns, and overcoming barriers to care by connecting them with necessary resources to ensure patients receive the appropriate treatment and support throughout their healthcare journey. A Patient Navigator also helps patients communicate with their healthcare providers, so they get the information they need to make decisions about their healthcare. They may also work with insurance companies, employers, case managers, lawyers, and others who influence a patient's healthcare needs. The proposed AAS in Patient Navigator is a 70 credit hour program designed to prepare students with knowledge about clinical care without the requirement of clinical bedside skills found in other clinical care programs. The proposed program will allow students the opportunity to earn two national levels of certification: CPNA – Certified Patient Navigator Assistant (entry level) and CPPN – Certified Professional Patient Navigator (Advanced level/Team Leader/Manager).

1. **Value:** Per Regent's policy, this program meets the criteria of a Quality Credential of Value.
 - a. **Workforce Demand and Job Opportunities:** Healthcare is a major economic driver on the Northshore contributing more than \$1.5 billion to the three-parish region of St. Tammany, Tangipahoa, and Washington. The industry represents 22,000 jobs in the area, and demand continues with 5,000 unique postings for jobs in the past 12 months. As the population grows across the Northshore, local healthcare leaders have expanded services to improve access to care closer to home. With the massive shortage of healthcare workers of all kinds, this program will add specially trained healthcare workers in the field of patient navigation and case management. The employment data below is representative of Regional Labor Market Area 2, where NTCC is located. Patient Navigator education requirements would fall between these two occupations, with the entry-level education typically required for Community Health Worker being a Technical Diploma and Medical Health Service Manager a bachelor's degree. As this occupation is new, data on the position is not yet available.

| Occupation | LWC Star Rating ¹ | Current Jobs ² | Projected Jobs 2034 ² | % Change ² | Average Salary ² |
|--|------------------------------|---------------------------|----------------------------------|-----------------------|-----------------------------|
| Community Health Worker | 3-star | 174 | 202 | 16% | \$57,000 |
| Medical and Health Service Managers | 5-star | 1,520 | 1,998 | 31% | \$117,000 |

¹Source – LWC

²Source – Lightcast

- b. **Curriculum Alignment with Employer Needs:** NTCC worked with Northshore Healthscape in the development of the proposed degree program. Northshore Healthscape is an economic development initiative aimed at promoting the Northshore as a healthcare destination. Key stakeholders in this collaborative represent St. Tammany, Tangipahoa, and Washington parishes, including North Oaks Health System, Ochsner Northshore-Mississippi Gulf Coast Region, Our Lady of the Lake Northshore, Slidell Memorial Hospital, St. Tammany Health System, and St. Tammany Corporation. The college has already received commitments for Patient Navigator job roles to be implemented at all major hospital systems on the Northshore.
- c. **Same or Similar In-State Programs:** The Patient Navigator program would be the first of its kind nationally and in Louisiana with the 2-exit point approach, (technical diploma and associate degree), two levels of certification, and opportunity for specialty concentration.
- d. **Student Enrollment and Completion:** The health sciences and nursing retention rates at NTCC are generally between 40% and 60%. Although this program will have a clinical experience component, there is no hands-on bedside skills requirement. This should result in more favorable retention rates for the program. The proposed AAS in Patient Navigator will provide an additional avenue for students who desire a healthcare pathway.

| | Year 1 | Year 2 | Year 3 | Year 4 |
|------------------------------------|--------|--------|--------|--------|
| TOTAL Estimated Program Enrollment | 22 | 44 | 54 | 54 |
| TOTAL Estimated Program Graduates | 0 | 22 | 22 | 22 |

- 2. **Resources:** The AAS in Patient Navigator will require one new full-time Program Coordinator position, as well as one additional full-time faculty member and two additional part-time faculty members. NTCC plans to apply for funding through the Health Care Employment Reinvestment Opportunity (H.E.R.O.) Fund to use toward faculty salaries and benefits and other implementation startup costs. The college is also looking at Northshore Healthscape for grant funding to sponsor a faculty member. No new costs outside of faculty are required to support this new program.

| | Current | Needed | Additional Costs |
|--|---|---|--|
| Faculty | Existing faculty will support the general education requirements for the program. | NTCC will hire a Program Coordinator, one full-time faculty member, and two part-time faculty members to support the program. | Yr. 1: \$193,000 Yr. 2: \$233,000 Yrs. 3+: \$300,000 |
| Physical (Facilities, Equipment, Library, & Technology) | Existing offices and classrooms are sufficient to support the program. | No additional resources are needed. | \$0 |

| | | | |
|------------------------|---|-------------------------------------|-----|
| Student Support | Existing resources will meet the needs of the program for the foreseeable future. | No additional resources are needed. | \$0 |
|------------------------|---|-------------------------------------|-----|

3. **Master Plan Priorities:** The following aspects of the proposal directly address priorities or goals of the statewide attainment goal and 2030 Master Plan.

- **Accessibility:** NTCC will deliver the clinical and general education portion in a hybrid format. This will allow more flexibility for working-age adults with full-time jobs to enroll in and complete the program.
- **Affordability:** The program will use Open Educational Resources (OER), freely available digital materials that can replace costly textbooks and other course materials. In addition, an Advanced Certification for Population Health Management, which is 21 credit hours, can be achieved in only nine (9) credit hours after receiving the AAS in Patient Navigator.
- **Partnerships:** Five major hospital systems have committed to creating Patient Navigator job positions to employ graduates of the proposed program. Industry partners are considering sponsorship of students to assist with the shortage of licensed nurses by employing Patient Navigators instead. NTCC is actively continuing to meet with and work with non-traditional industry stakeholders to ensure Patient Navigators can assist in programs such as Community-Based Federally Qualified Health Clinics, Intensive Outpatient Programs (Psychiatric Day Programs), and insurance entities.
- **Work-based Learning:** The proposed program will offer five internships throughout the curriculum. Additionally, students will be placed with various healthcare facilities (e.g., acute care, Federally Qualified Health Center (FQHCs), outpatient, public health, etc.) that incorporate Patient Navigator roles. Guided assignments will be provided for each clinical experience, including post-experience reflections.
- **Other program attributes that contribute to closing the achievement gap with underserved populations:** The AAS in Patient Navigator program is designed to educate and support a diverse student population through its open access and non-competitive admissions, providing all students access to a healthcare career. By having this non-bedside alternative job role, the proposed program can serve physically disabled individuals who are unable to assist bedside patients and older/retired individuals ready to re-enter the healthcare job force.

Staff Analysis

The proposed AAS in Patient Navigator seeks to provide a specialized program of study that will prepare students with nursing-related clinical education without the requirement of bedside clinical care. Five major hospital systems in the area have committed to employing graduates in the proposed program. There is a greater need than ever for healthcare systems in Louisiana to provide quality care in an affordable manner and ensure high levels of patient satisfaction.

STAFF RECOMMENDATION

Senior Staff recommends conditional approval of the proposed Associate of Applied Science in Patient Navigator (CIP 51.2208) at Northshore Technical Community College, with a progress report on program implementation submitted as part of the institution's 2025 Academic Plan.

AGENDA ITEM IX.D.1.d.

Proposed Bachelor of Arts in Digital Media Arts Southern University and A&M College

Background Information

Southern University and A&M College (SUBR) requests Board of Regents' approval to offer a Bachelor of Arts (BA) in Digital Media Arts. The proposal was approved by the Southern University Board of Supervisors then submitted to Regents for consideration. Regents staff approved the institution's request to add the proposed program to its 2024 Academic Plan based on evidence of need and external support for the program. The proposal was then favorably reviewed by Chief Academic Officers statewide.

Staff Summary

The proposed program is an interdisciplinary program developed in collaboration with the institution's visual and performance arts and mass communications departments. It is designed to provide a solid foundation in techniques and theory in one focused area and a broad understanding of related disciplines including arts, humanities, and technology. The proposed Digital Media Arts program is designed with five areas of concentration: Digital Screen Arts Production, Digital Performance Fusion, Visual Arts and Motion Graphics, Digital Sports Production, and Recording Arts—preparing students for success in the rapidly growing digital media arts industry.

1. **Value:** Per Regent's policy, this program meets the criteria of a Quality Credential of Value.
 - a. **Workforce Demand and Job Opportunities:** With the advancement of technology, the demand for skilled individuals is steadily increasing. The proposed program is designed to prepare graduates for careers including Producers and Directors, Animators, Advertising and Promotions Managers, and Audio and Video Technicians.

| Occupation | LWC Star Rating ¹ | Current Jobs ² | Projected Jobs 2034 ² | % Change ² | Average Salary ² |
|--|------------------------------|---------------------------|----------------------------------|-----------------------|-----------------------------|
| Producers and Directors | 4-star | 195 | 196 | 1% | \$67,000 |
| Arts, Design, Entertainment, Sports, and Media Occupations | 3/4-star | 4,175 | 4,504 | 8% | \$48,000 |
| Audio and Video Technicians | 3-star | 647 | 669 | 3% | \$39,000 |

¹Source – LWC

²Source – Lightcast

- b. **Curriculum Alignment with Employer Needs:** Industry leaders have stressed the need for proficiency in relevant software and industry demands in digital media arts education.
- c. **Same or Similar In-State Programs:** While there are similar programs offered within the state that are part of Visual and Performing Arts and Digital Media Arts programs, the proposed BA in Digital Media Arts at SUBR will be the only program of its kind in the region and in the Southern System.
- d. **Student Enrollment and Completion:** Enrollment projections are based on surveys and interviews SUBR conducted during the 2022–2023 academic year to gather feedback and expectations for the development of the proposed program. Of the first year and incoming students, 60% believed digital media arts education was extremely important for 21st century careers. It is expected that students enrolled in similar programs can opt to take courses from the Digital Media Arts program as electives or minors. Additionally, students currently enrolled in similar existing programs may choose to pursue a degree in

the Digital Media Arts program.

| | Year 1 | Year 2 | Year 3 | Year 4 |
|------------------------------------|--------|--------|--------|--------|
| TOTAL Estimated Program Enrollment | 10 | 20 | 30 | 50 |
| TOTAL Estimated Program Graduates | 0 | 0 | 0 | 15 |

2. Resources: To support full implementation of the program, the institution anticipates the addition of five new faculty members; one for each concentration with additional adjunct instructors as needed. A graduate assistant position will also be needed to support the program. Federal Title III funding has been approved to cover the increase in indirect costs for Years 1 through 5.

| | Current | Needed | Additional Costs |
|--|--|--|---|
| Faculty | There is currently no staff supporting the program. | Five new faculty members will be hired. | Yr. 1: \$187,843 Yr. 2: \$281,765 Yrs. 3-4: \$375,687 |
| Physical Facilities, Equipment, Library, & Technology | Renovations to facilities are underway to support the program. | A recording studio and digital media production studio will be needed along with several pieces of technology and equipment. | Yr. 1: \$236,547 Yr. 2: \$48,000 |
| Student Support | There is currently no graduate assistant in place to support the program. All other existing student support services are in place to support the program. | A graduate assistant is needed to support the program. | Yrs. 1-4: \$20,000 |

3. Master Plan Priorities: The following aspects of the proposal directly address priorities or goals of the statewide attainment goal and 2030 Master Plan.

- **Accessibility:** The proposed Digital Media Arts courses will be offered during the day and evenings using the traditional face-to-face instruction format. Faculty are actively exploring hybrid and fully online formats for some courses as the program matures.
- **Affordability:** The Southern University Bookstore participates in Follett Access, a partnership that allows students to rent textbooks (including eBooks) at reduced rates. Instructors also use OER (Open Educational Resources) as well as Open Access (OA) materials when possible.
- **Partnerships:** SUBR is actively pursuing partnerships with New Orleans Video Access Center (NOVAC), Sports Videos Group (SVG), Louisiana Film Commission, and Society of Motion Picture and Television Engineers. The institution is also partnering with the SUBR's laboratory school, local high schools, and community colleges for student recruitment. An advisory council of leading professionals will also be established to support the program's vision.
- **Work-based Learning:** The proposed program includes internships as part of the curriculum for all concentrations.
- **Other program attributes that contribute to closing the achievement gap with underserved populations:** The proposed program will help increase the number of students and graduates from a diverse population who can gain more access to the industry as multimedia artists, animators, producers, and directors.

Staff Analysis

The proposed BA in Digital Media Arts was developed in direct response to industry demand for the technical and creative skills necessary to be competitive in the digital media arts industry. The program will fill a gap in the state's HBCU institution degree offerings. External funding for the program will provide the needed funds to launch the program while it grows.

STAFF RECOMMENDATION

Senior Staff recommends conditional approval of the proposed Bachelor of Arts in Digital Media Arts (CIP 50.0102) at Southern University and A&M College, with a progress report on program implementation submitted as part of the institution's 2025 Academic Plan.

AGENDA ITEM IX.D.2.a.

Proposed Center for Comparative Oncology Louisiana State University and A&M College

Background Information

A Board of Regents approved center (Academic Affairs Policy 2.05) is an academic research unit organized and structured around broad-ranging interdisciplinary research efforts. A center typically resides within an existing academic unit that facilitates efforts of the institution to attract external funding for related research.

Louisiana State University and A&M College (LSU) is requesting approval to establish the Center for Comparative Oncology (CCO). The Louisiana State University Board of Supervisors approved the request and submitted it to Regents for consideration.

Staff Summary

1. Description and Need

The proposed Center for Comparative Oncology (CCO) will be unique in Louisiana. The main theme of the proposed CCO is the unified approach for dealing with cancers in both human and animal patients. This comparative approach can provide new therapeutic approaches for the treatment of both human and animal cancers under the principle of the Center for Disease Control's One Health approach to healthcare. The proposed center is a collaboration of the LSU School of Veterinary Medicine (LSU Vet Med) with the LSU Health Sciences Center in New Orleans and is based on existing relationships of faculty that are already collaborating on a variety of projects. With the prevalence of cancer in Louisiana, basic and translational research is needed to discover and implement novel therapies against highly aggressive cancers. A comparative oncology approach provides unique opportunities to test a variety of therapeutic approaches in animals with the goal of providing therapies for both animals and humans.

Less than 5% of anti-cancer drugs are successful in clinical trials, indicating that current pre-clinical cancer drug research is not predictive of efficacy in humans. Louisiana ranks 5th in the nation for cancer mortality and above the national average for a variety of cancers that also disproportionately affect African Americans. This health disparity is of great concern to Louisiana. Comparative oncology is the study of naturally occurring cancer in animals and the comparison to its human counterpart for better understanding the biology of cancer including tumor microenvironment and immune cell interactions, and to achieve treatments that mutually benefit both humans and animals. Pets share our environment and develop all types of cancers that are commonly seen in human patients. The clinical behavior and treatment of cancer in pets and humans are almost the same.

The State of Louisiana and LSU are pursuing the National Cancer Institute (NCI) Designation as an NCI-approved Cancer Center. This application is led by the LSU Health Sciences Center New Orleans (LSU HSC-NO) Stanley S. Scott Cancer Center with the strong involvement and support of the LSU School of Veterinary Medicine's (LSU Vet Med) proposed Center for Comparative Oncology (CCO). The CCO will manage the existing Center for Pre-Clinical Cancer Research (CPCCR or Cancer COBRE), which is currently in its third-year of a five-year award from the National Institute of Health (NIH) and can be renewed for an additional 13 years (\$11 million for the first five years). This grant award will provide funding for junior investigators in Vet Med, LSU at-large and Southern University A&M College, as well as core facilities and equipment to conduct nationally competitive research and enable investigators to pursue additional funding from NIH and other sources. A significant aspect of this program grant and the CCO is the use of three-dimensional cell culture systems (organoids) for improving the predictability of human cancer phenotypes and developing therapeutic strategies. The CCO will provide a multi-prong approach to support exploratory cancer research,

mechanisms of tumorigenesis and tumor progression as well as translational assessment that will lead to the development of successful therapeutic strategies in humans and animals.

2. Initiatives and Objectives

The CCO's objective is to develop a multidisciplinary program in oncology that uses small animal spontaneous tumor models and organoids made from these spontaneous tumors for better understanding of the basic mechanisms of cancers and their treatment that could impact both animal and human cancers. The specific aims of CCO are to do the following:

- Promote and support centralized management and coordination of pre-clinical evaluation of tumorigenesis mechanisms and translational therapeutic approaches.
- Provide cancer researchers with a core infrastructure for resources and support for advanced pre-clinical cancer disease.
- Provide training and mentorship on pre-clinical evaluation using state-of-the-art in vitro 3D tumor spheroids and organoids to complement in vivo cancer disease modeling.

Cancer research is a priority for LSU. The establishment of the CCO will promote collaborations among LSU faculty from different LSU institutions including LSU A&M, the LSU AgCenter, Pennington Biomedical Research Center, LSU HSC-NO and LSU HSC Shreveport. LSU envisions that this collaboration will be extended into human and animal clinical trials as well as joint academic programs. LSU Vet Med is actively seeking to expand collaboration with other institutions throughout the state.

3. Resources and Administration

The CCO will be managed by Director Dr. Joseph Francis. The director will report directly to the Dean of LSU Vet Med with input from the CCO Executive Council responsible for operational oversight and guidance. The executive council will include representatives from Vet Med, Southern University, and LSU HSC-NO.

A CCO Advisory Board will consist of senior faculty with active programs in cancer research as well as physicians that specialize in cancer research and treatment. The CCO Advisory Board will meet at least once a year, following one of the CCO executive meetings to provide additional guidance on activities and priorities.

The CCO research and activities will be supported by nearly twenty LSU faculty from Vet Med, the College of Sciences, and the LSU AgCenter with another six faculty research collaborators from LSU HSC-NO. A wide variety of state-of-the-art facilities, equipment, and technology available both at LSU and at LSU HSC-NO will support the research of the proposed new center. There is no need for additional facilities currently. However, increased funding may allow the relocation of LSU Vet Med cancer efforts into a new facility that may be built for specific purposes in the future.

4. Budget

Initial startup expenses for the proposed CCO are about \$55,000 for the first year. Ongoing operational expenses include salary for a manager, data sets, and other supplies totaling approximately \$105,000 to \$115,000 per year. The center has approximately \$560,000 in grant funding plus \$313,000 in startup support from LSU for the first year. The unit currently has nearly \$10 million in pending NIH grants to support the center's growth and research.

LSU Vet Med is managing two additional NIH Program grants that have a direct impact on cancer research. These are: 1) the Center for Lung Biology & Disease (CLBD) that focuses on lung diseases including lung cancer (approx. \$11 million over five years and renewable for 10 more years) and 2) the Louisiana Biomedical Research Network (LBRN) that promotes biomedical research throughout Louisiana with special

interests in cancer research (approx. \$20 million over five years, renewable indefinitely as the only such program grant in Louisiana).

Staff Analysis

LSU is proposing a unique research collaboration to move cancer research forward in Louisiana in support of its application as an NCI approved Cancer Center. A strong record of research funding, industry partnerships, and collaborative research are evidence that LSU Vet Med is well positioned to support this proposed interdisciplinary research effort.

STAFF RECOMMENDATION

Senior Staff recommends authorization of the Center for Comparative Oncology at Louisiana State University and A&M College. A progress report and request for continued authorization is due February 1, 2027.



Kim Hunter Reed, Ph.D.
Commissioner
of Higher Education

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Chair
At-Large

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4th Congressional District

Board of Regents Meeting as a Committee of the Whole

Agenda

Planning, Research, and Performance

Tuesday, January 28, 2025

12:50 PM

Claiborne Building, 1st Floor • Louisiana Purchase Room 1–100
1201 N. Third St. • Baton Rouge, LA 70802

IX. Reports and Recommendations

E. Planning, Research, and Performance

1. Consent Agenda

a. R.S. 17:1808 (Academic Licensure)

- i. Initial Applications
 - a. Herzing University – Madison
 - b. Lake Erie College

2. Legislative Reports

a. House Concurrent Resolution No. 17

- i. Teacher Recruitment, Recovery, and Retention Task Force 2024 Annual Report

AGENDA ITEM IX.E.1.a.i.a.
Herzing University – Madison
Madison, Wisconsin

BACKGROUND

Herzing University first registered with the Board of Regents in 1998. The institution is headquartered in Milwaukee, Wisconsin and operates schools in eight states, including a location in New Orleans. Herzing University is accredited by the Higher Learning Commission (HLC). Herzing University – Madison (HU-M) is also a member of the interstate compact for distance learning, NC-SARA.

ACADEMIC PROGRAM

HU-M focuses on nursing, healthcare and technology programs. The institution will offer an Associate of Science in Surgical Technology to Louisiana residents, which is a hybrid program that includes in-person labs and clinicals. Currently, the college does not have any students enrolled in the program.

| Degree Level | Louisiana Unduplicated Headcount Enrollment |
|---------------------|--|
| Doctorate | 0 |
| Master's | 0 |
| Bachelor's | 0 |
| Associate | 0 |
| Other | 0 |
| Total | 0 |

FACULTY

HU-M has 1 full-time and 11 part-time faculty to support Louisiana students in the Surgery Technology program.

FACILITIES

HU-M is planning to offer a hybrid program to Louisiana residents with online instruction, lab classes to be held at the Louisiana campus location and a required clinical practicum to be completed at a local healthcare facility.

STAFF RECOMMENDATION

Given the scope of the program and the credentials of its faculty, program accreditation, and the general oversight by the home campus, Senior Staff recommends approval of the application for an *initial* license from Herzing University - Madison (HU-M).

AGENDA ITEM IX.E.1.a.i.b**Lake Erie College****Painesville, Ohio****BACKGROUND**

Lake Erie College (LEC) is a private liberal arts college located in Painesville, Ohio, accredited by the Higher Learning Commission (HLC). LEC was previously a member of the interstate distance education compact, NC-SARA and provided education to Louisiana students under that agreement.

ACADEMIC PROGRAM

LEC offers over 30 programs of study at its main campus in the areas of Humanities, Education, Business and Social Sciences, Natural Sciences and Math, and Equine Studies. The institution offers two education degrees to Louisiana residents: Bachelor of Arts in Elementary Education and Bachelor of Arts in Intervention Specialist. These are hybrid programs that include in-person field experiences and student teaching. Currently, LEC has 23 students enrolled in these programs.

| Degree Level | Louisiana Unduplicated Headcount Enrollment |
|--------------|--|
| Doctorate | 0 |
| Master's | 0 |
| Bachelor's | 23 |
| Associate | 0 |
| Other | 0 |
| Total | 23 |

FACULTY

LEC has four full-time and 12 part-time faculty to support Louisiana students. All faculty hold a doctorate or professional degree.

FACILITIES

LEC offers a hybrid program to Louisiana residents with online instruction and field experiences, with student teaching to be completed in a local school district.

STAFF RECOMMENDATION

Given the scope of its programs and the credentials of its faculty, program accreditation, and the general oversight by the home campus, Senior Staff recommends approval of the application for an *initial* license from Lake Erie College (LEC).

Agenda Item IX.E.2.a.i.
EXECUTIVE SUMMARY

TEACHER RECRUITMENT, RECOVERY, AND RETENTION TASK FORCE REPORT

House Concurrent Resolution 39 of the 2021 Regular Legislative Session created the Teacher Recruitment, Recovery, and Retention Task Force. House Concurrent Resolution 17 of the 2023 Regular Legislative Session extended the timeframe of the Task Force through July 17, 2025. Under the jurisdiction of the Board of Regents, the Task Force is charged with studying the declining enrollment in educator preparation programs, as well as strategies and best practices that the state, individual school districts, and educator preparation programs can implement to increase rates of employment and retention of teachers.

In December 2021, this Task Force submitted a preliminary report, which included data from national and state sources to determine the major issues driving educator shortages and develop initial recommendations. Since this preliminary report, the Task Force has continued to convene and has advanced a robust list of recommendations. The 2024 report provides an update on the initiatives and results of the Task Force.

STAFF RECOMMENDATION

Senior Staff recommends the Board receive the 2024 final report for HCR 17 of the 2023 Regular Legislative Session and authorize Regents staff to submit this report to the House and Senate Committees on Education.



BOARD of REGENTS
STATE OF LOUISIANA



LOUISIANA TEACHER RECRUITMENT, RECOVERY, AND RETENTION TASK FORCE

2024 REPORT

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IMAGE SOURCES (Covers): University of Louisiana at Lafayette

IMAGE SOURCES (Interior): Grambling State University, Leslie Westbrook/The Acadiana Advocate, Louisiana Board of Regents, Louisiana Department of Education



Task Force Welcome

We are honored to present the annual report of the Louisiana Teacher Recruitment, Recovery, and Retention (TRRR) Task Force, which details the strategic initiatives and progress made to enhance educator recruitment, recovery, and retention in our state. As we navigate the challenges in the education sector, this document serves as a comprehensive overview of our strategies, goals, and measurable outcomes aimed at fostering a robust teaching workforce.

Louisiana has seen a positive increase in the number of teachers, reaching 52,208 in 2024 – an increase of 843 from the previous year. This includes educators in both traditional and charter schools within the K-12 public system. However, teaching vacancies persist, indicating ongoing challenges in recruitment and retention. These shortages can negatively affect student learning and educational quality. To address this, effective strategies such as offering incentives, enhancing professional development, and improving working conditions are essential, along with continuous monitoring of teacher supply and demand.

The Louisiana Legislature has played a crucial role in supporting the Teacher Recruitment, Retention, and Recovery Task Force. Since establishing of the Task Force in 2021, the Louisiana Legislature has supported several actions in response to its work, including:

- Act 244 of the 2022 Regular Session initiated action to enable experienced out-of-state teachers to become certified in Louisiana.
- Additional compensation was provided through the Minimum Foundation Program for mentor teachers;
- The Praxis Core requirement for entry into a postsecondary education teacher preparation program and initial licensure was removed;
- The Geaux Teach program was established to provide scholarships to students enrolled in teacher preparation programs or alternative certification programs at postsecondary education institutions within the state that have been approved by the Board of Elementary and Secondary Education (BESE);

- Act 569 of the 2024 Regular Session requires teacher training initiatives to either provide compensation or eliminate another training requirement;
- Act 338 of the 2024 Regular Session mandated the creation of a database of training for professional teachers by the State Department of Education;
- Act 311 of the 2024 Regular Session requires schools to provide additional compensation for teachers and school employees under certain circumstances, recognizing the extra efforts and responsibilities they undertake;
- Act 313 of the 2024 Regular Session bans cell phone use by students on campus, aiming to minimize distractions and enhance the learning environment;
- Act 771 of the 2024 Regular Session provides high-dose tutoring for students who failed to achieve mastery on statewide assessments in reading and/or math, or who performed below grade level on literacy or numeracy screenings in the current academic year, ensuring targeted support for struggling learners;
- Act 716 of the 2024 Regular Session established that no requirement that increases the uncompensated training burden on professional teachers shall take effect. Additional training requirements can only be implemented if participating teachers are compensated or the training offset by the elimination of another requirement of equal time. The Louisiana Department of Education maintains a list of instructional requirements not covered by state content standards and reports to the House and Senate Committee on Education every five years; and
- Act 337 of the 2024 Regular Session lowers the allowable expulsion age from 16 to 13 for students found in possession of a firearm, tightening regulations that enhance school safety.

These legislative changes reflect a commitment to improving the teaching profession, supporting student learning, and ensuring a safer and more effective educational environment. New initiatives are designed not only to recruit new educators but also to ensure their long-term success and retention within the profession. We believe that by fostering an environment that values and supports our educators, we can significantly enhance student outcomes across Louisiana.

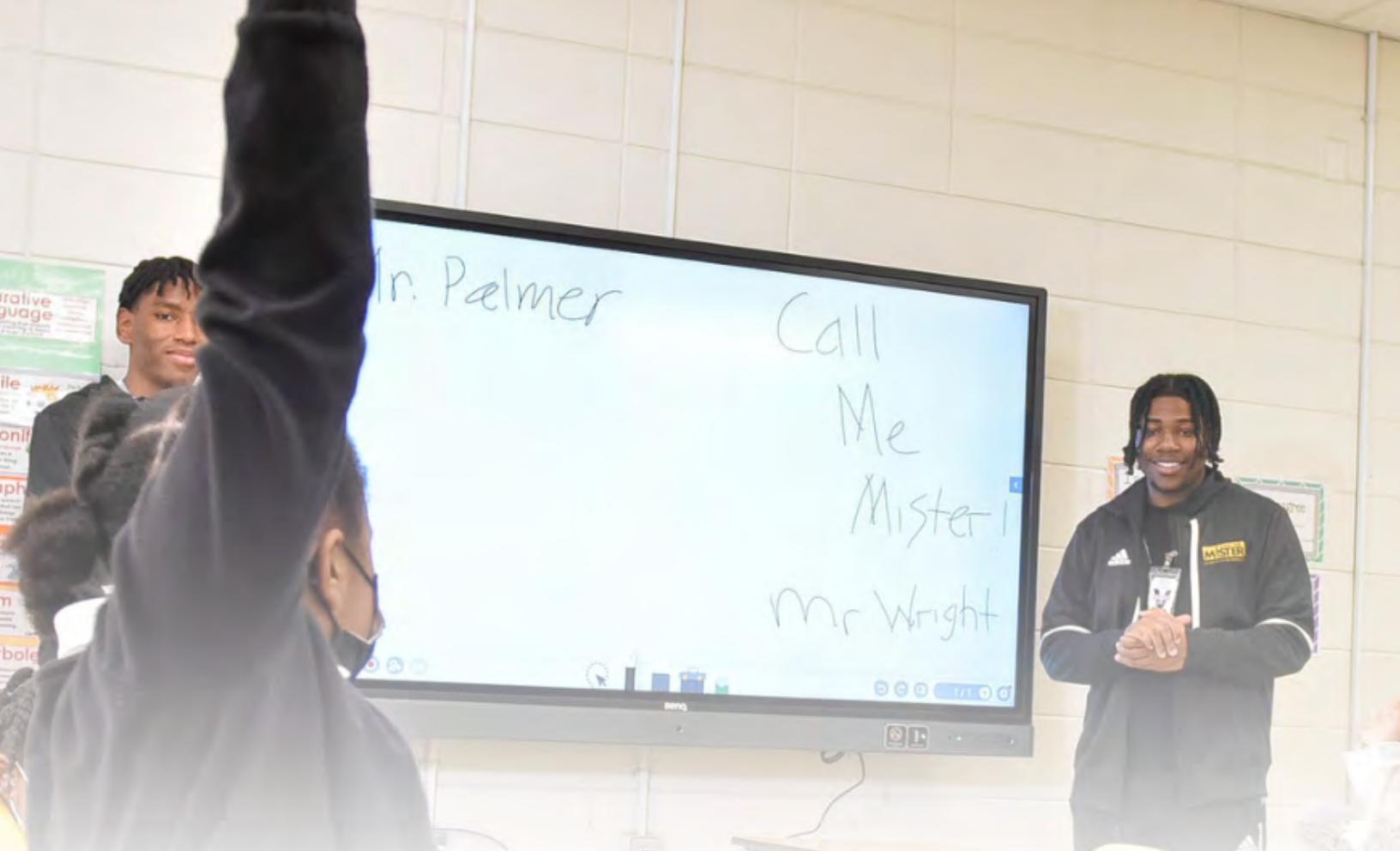
We encourage you to review this report in detail, as it reflects the ongoing dedication to elevating the teaching profession in Louisiana and the steadfast commitment of our Task Force members.



Barry Erwin
Co-Chair, TRRR Task Force
President & CEO, Council for a Better Louisiana



Kim Hunter Reed, Ph.D.
Co-Chair, TRRR Task Force
Commissioner of Higher Education



► **Historical Overview of the Louisiana Teacher Recruitment, Recovery, and Retention Task Force**

Since its inception in 2021, the Louisiana Teacher Recruitment, Recovery, and Retention Task Force has played a crucial role in addressing persistent shortages of well-prepared teachers – especially in specific content areas, grades, and geographies – by using its authority to research and develop a good understanding of challenges facing the Louisiana teacher workforce and mobilizing critical policy recommendations so that more individuals, especially those from marginalized backgrounds, are able to access excellent training to enter and persist in the teaching profession.

Established by [House Concurrent Resolution No. 39](#), the Task Force set out with two overarching goals: to combat declining enrollment in educator preparation programs (EPPs) and to develop strategies for increasing teacher retention across Louisiana. The Task Force has acted as a catalyst for meaningful reform by fostering collaboration between the Louisiana Board of Regents (BOR), Louisiana Department of Education (LDOE), state legislators, local school and system leaders, and other educational stakeholders (e.g., unions, nonprofits, business community). The work of the Task Force was bolstered by its partnerships with national and state research and policy leaders including Deans for Impact and SSA Consultants; local leaders, including Call Me MiSTER administrators at Grambling State University; and dual enrollment program leads in several school districts. All of these partners are innovating around areas relevant to the work of the Task Force and played an important role in shaping recommendations put forth by the Task Force. The Task Force's efforts have produced actionable solutions, provided immediate impact in communities across Louisiana, and paved the way for future improvements to the state's teacher workforce.

MAJOR ACCOMPLISHMENTS

Under the Task Force's leadership, several significant shifts have taken place in the system, driven by local innovations of practice and aided by policy change, including:

Increased recruitment of and access to teaching training for aspiring teachers.

In 2024, the Task Force studied ways in which pathways support candidates, especially those from diverse backgrounds, to not only access and afford initial teacher training but also to persist through those pathways and into the profession. These findings reinforced the state's decision to remove the basic skills assessment requirement for entry into postsecondary education programs. The Task Force also heard from national and state experts on a broad array of solutions that could affect teacher recruitment and the affordability of high-quality pathways, including teacher residencies, diversifying the teaching profession, and other initiatives to make teaching affordable as a career (e.g., housing and transportation stipends). For example, the Task Force explored challenges related to the state's mandatory year-long residency for traditionally prepared teacher candidates and learned how other jurisdictions are overcoming those hurdles through strategic staffing and compensating aspiring teachers for instructional service (e.g., high-impact tutoring) throughout their teacher training.

Stronger preparation for aspiring and early-career teachers. At multiple points during their years of service, Task Force members heard from national and state experts on the importance of ensuring opportunities for practice are intentionally woven throughout a teacher candidate's experience and increase in complexity over time. Based on these findings, the Task Force recommended and supported the adoption of policy that aided growth across a number of new pathways into teaching, including the pre-educator pathway, the para-to-teach-model, as well as Louisiana's first Registered Apprenticeship Program in K-12 Teaching, approved at both the state and federal levels. These pathways are designed to ensure aspiring teachers from different backgrounds are able to train in PK-12 schools, work directly with PK-12 students, and receive aligned feedback and mentoring to help them master state teaching competencies from building meaningful relationships to delivering rigorous instruction.

Increased retention through teacher pay, reciprocity, and differentiated teaching roles.

Based on insights from the state-commissioned Compensation Study, as well as expert insights from national and state research, the Task Force made a number of recommendations that have strengthened teacher pay, advanced reciprocity, and differentiated roles for current teachers. Louisiana's increased Mentor Teacher Stipend of \$2,000, now included in the Minimum Foundation Program formula, exemplifies the state's focus on improving early-career teacher support, a key element in retention strategies. Act 244 (2022) enabled out-of-state teachers to obtain certification in Louisiana without a mandatory year of in-state teaching experience. This reciprocal agreement widened the pool of qualified educators and helped fill teaching vacancies more quickly.

Throughout its work, the Task Force consistently has grounded its recommendations in research and data, ensuring that the policies it recommended were rooted in evidence and best practices. For instance, the Task Force's emphasis on practice-based preparation pathways was informed by decades of research demonstrating that high-quality, hands-on experiences are critical for teacher development. Similarly, the decision to support the Registered Apprenticeship Program was based on national data showing that such programs can reduce entry barriers for aspiring teachers, especially the cost of high-quality preparation, while offering rigorous on-the-job training.



By connecting research to practice, the Task Force ensured that its recommendations would have a measurable impact on the ground, enhancing the preparedness of teachers and improving student learning outcomes. This alignment of policy with practice has been a cornerstone of the Task Force's success, demonstrating the value of evidence-informed decision-making in addressing Louisiana's teacher workforce challenges.

► **Looking Forward: Sustaining and Building Upon the Task Force's Work**

As the Task Force concludes its current mandate, the path forward is one of cautious optimism. The successes achieved thus far, particularly in terms of recruitment, retention, and recovery of the teacher workforce, have laid a strong foundation for continued progress; however, these efforts must be sustained and expanded in order to fully address the complex challenges facing Louisiana's education system.

Moving forward, state leaders must continue to prioritize:

- Sustainable, High-Quality Educator Pipelines: Launching, scaling and sustaining accessible, high-quality pathways into teaching, especially for those populations currently underrepresented in the workforce, are essential to success.
- Teacher Compensation: Ensuring that educators are fairly compensated for their work remains critical to retaining high-quality teachers.
- Ongoing Research and Evidence-Based Policy Development: Policymakers must continue to base their decisions on rigorous research and data, ensuring that future initiatives are both effective and sustainable.

By maintaining a focus on these areas and continuing to collaborate with key stakeholders, Louisiana can build on the momentum generated by the Task Force and ensure that every student in the state is instructed by a well-prepared, high-quality teacher. The work of the Task Force serves as a blueprint not only for Louisiana but also for other states that are facing similar challenges in teacher recruitment, retention, and recovery.

Recruitment

Louisiana is actively working to strengthen its teacher preparation and retention efforts through a series of innovative initiatives designed to build a robust pipeline of qualified educators. With a focus on enhancing accessibility and diversity, programs such as the Pre-Educator Pathway and the Para-to-Teacher Model are designed to attract and support aspiring teachers, particularly candidates of color aligned to the Louisiana Department of Education's goal to increase teacher diversity. Additionally, initiatives like the Aspiring Principal Fellowship and the Recruitment and Retention Fellowship develop future leaders in education. Providing resources such as Praxis vouchers for certified teachers seeking further qualifications is one way that Louisiana is showing its commitment to addressing the challenges of declining enrollment in educator preparation programs and ensuring that every classroom is led by an effective teacher.

► Paying for OFAT Praxis

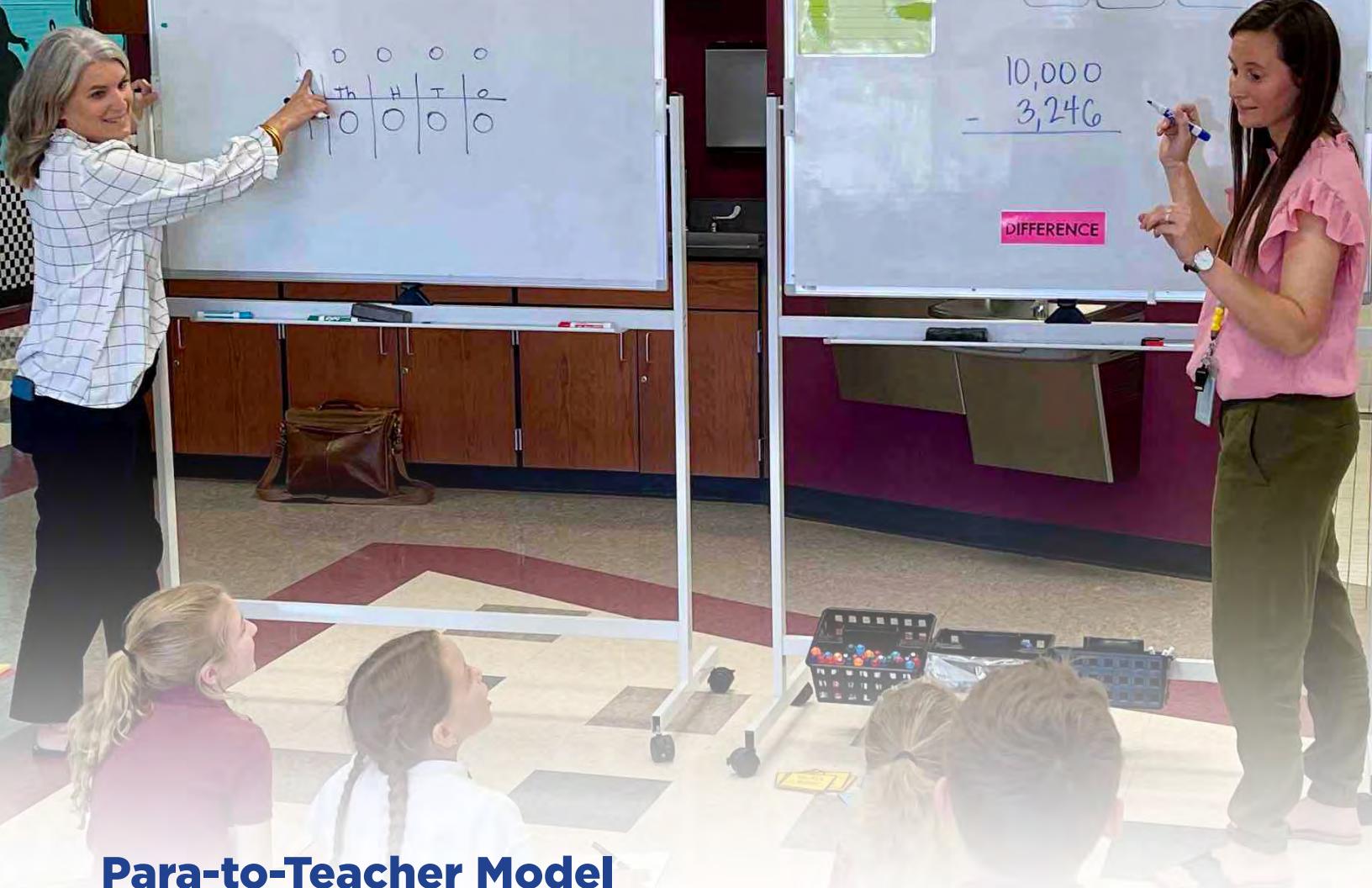
In the 2023-2024 school year, LDOE began an initiative to encourage certified teachers who do not teach within their certification field to gain certification by purchasing Praxis vouchers and Out-of-Field Authority to Teach (OFAT) certification vouchers for those individuals. Spending nearly \$20,000, the LDOE supported 77 teachers through this program. Applicants received one to three Praxis vouchers and could schedule the assessments at their convenience. Supporting teachers in this way delivers on LDOE's priority of having an effective teacher in every classroom.

Pre-Educator Pathway

This table highlights the progress of the Pre-Educator Pathway course over two academic years as reported by the Louisiana Department of Education.

Table 1. Pre-Educator Pathway.

| Goals | Progress | |
|---|--|--|
| | 2022-2023 | 2023-2024 |
| The pre-educator pathway course was taught in 50 schools/school systems in 2022-2023. | <u>70</u> schools offered the pre-educator pathway. | <u>89</u> schools offered the pre-educator pathway. |
| At least 1,000 students are participating in the pre-educator program statewide. | <u>1,096</u> students were enrolled in the pre-educator pathway. | <u>1,724</u> students were enrolled in the pre-educator pathway. |
| By the 2022-2023 school year, 50% of students enrolled in the pre-educator pathway will be students of color. | <u>51%</u> of students were students of color. | <u>52%</u> of students were students of color. |



Para-to-Teacher Model

The Para-to-Teacher Model goals set by the Louisiana Department of Education experienced significant enrollment. Overall, the model demonstrates a commitment to expanding educational opportunities while promoting diversity among participants.

Table 2. Para-to-Teacher Model.

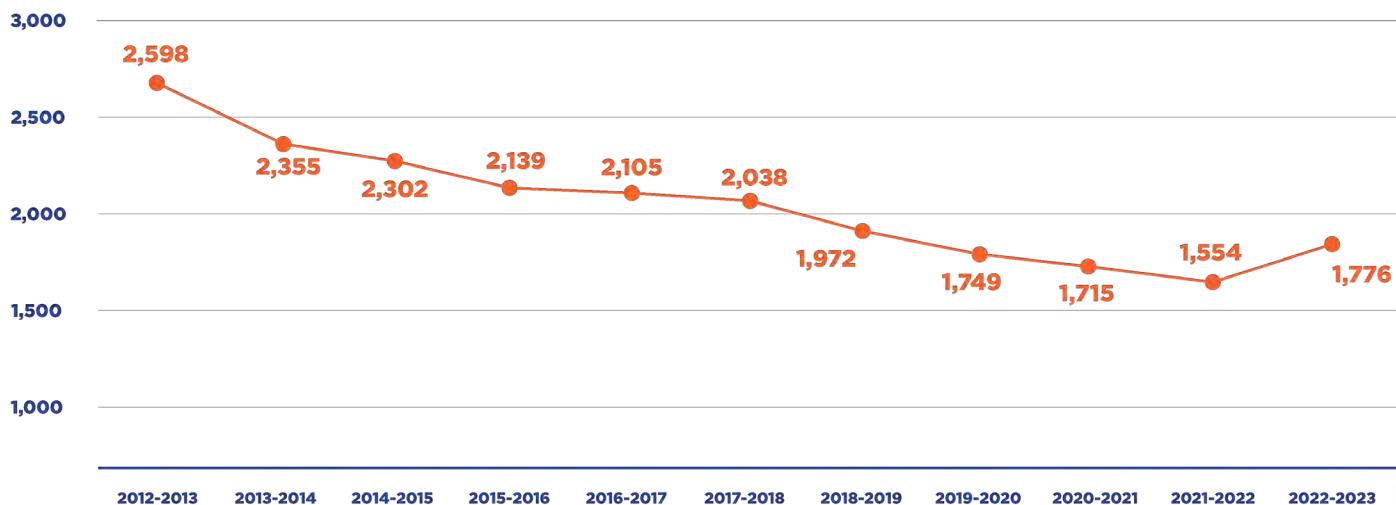
| Goals | Progress | |
|--|--|---|
| | 2022-2023 | 2023-2024 |
| The para-to-teacher model will increase by 75 participants each year. | <u>331</u> new Louisiana school system employees enrolled in the para-to-teacher model to begin coursework in Fall 2023. | <u>597</u> new Louisiana school system employees enrolled in the para-to-teacher model between January 2024 and September 2024. |
| New enrollees in the para-to-teacher model will be 40% candidates of color in 2023-2024. | <u>49%</u> of the 2023-2024 para-to-teacher cohort were candidates of color. | <u>41%</u> of the 2024-2025 para-to-teacher cohort are candidates of color. |

► Compensation

Additional compensation for our teachers is an ongoing challenge. However, in 2022-2023, the Mentor Teacher Stipend was successfully included in the Minimum Foundation Formula. In addition using the Compensation and Incentives Study completed by SSA Consulting, a \$2,000 stipend was provided to all teachers and a \$1,000 stipend to all support staff.

► Teacher Preparation, Enrollment, and Completion Trends

Figure 1. Completers of Louisiana Teacher Preparation Programs.



Source: Louisiana Department of Education, 2024

In the United States, enrollment in educator preparation programs has decreased by 30% over the past decade, with 591,000 people enrolled in Educator Preparation Programs in academic year 2020-2021 compared to 888,000 in 2010-11 (Saenz-Armstrong, 2023). The total number of completers has also fallen by more than 25%. However, both enrollment and completion nationally have seen an 8% recovery in the academic year 2020-21, compared to pre-pandemic levels (2018-2019) (Saenz-Armstrong, 2023).

In Louisiana, the trend of declining enrollment in Educator Preparation Programs (EPP) is experienced by both public and private programs, and particularly in mathematics, science, and special education disciplines (Louisiana Board of Regents, 2023). Enrollment in traditional educator preparation programs has declined by approximately 8% over the last four years; however, we are beginning to see an increase to pre-pandemic levels. Further, it is important to address the recruitment and retention of educators of color, as they face unique challenges in pursuing education careers (Louisiana Department of Education, 2024). The Task Force was established to investigate various factors that affect enrollment in educator preparation programs, teacher career longevity, changes in school culture, teacher retirement, and more (Louisiana Board of Regents, 2023).



The majority of the recovery in educator preparation enrollment (EPPs) and completion can be attributed to alternative route programs (Saenz-Armstrong, 2023). Between the 2019-2020 and 2020-21 academic years, enrollment and completion in alternative EPPs increased nationally by 20% and 16% respectively, while Louisiana has seen a 36% increase (Saenz-Armstrong, 2023). These data suggest that alternate EPPs are becoming increasingly popular among aspiring teachers, potentially due to their flexibility and accessibility.

Figure 2. Percentage of Teachers by Certification Type in Traditional Schools.
(Charter Schools Are Excluded)

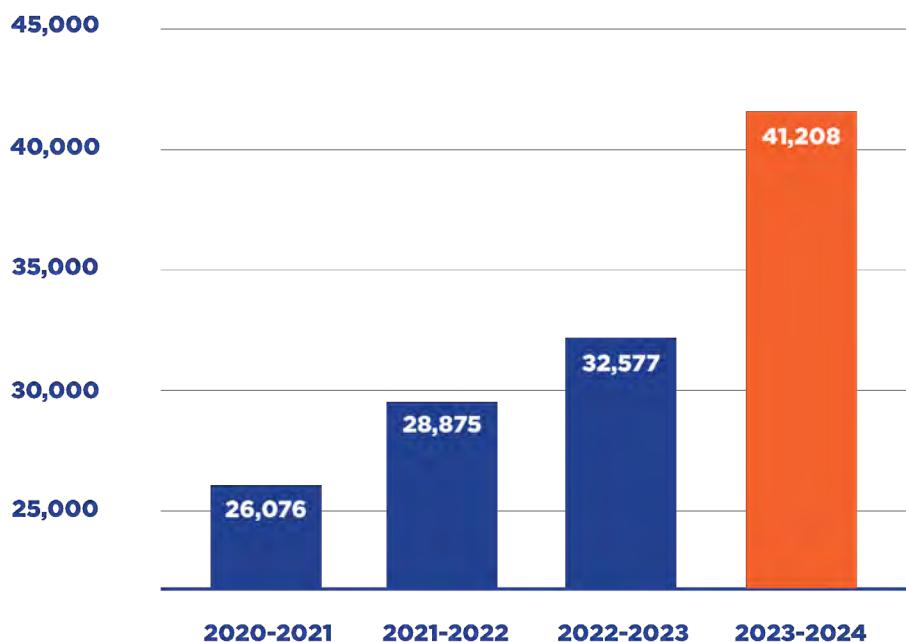


Source: Louisiana Department of Education, 2024

► Dual Enrollment Pre-Educator Pathway

In order to increase the number of individuals entering the teaching pipeline, the Task Force has recommended several strategies, including Pre-Educator Pathways, the Para-to-Teacher Model, and Compensation models. Since the Fall of 2021, Pre-Educator Pathways have experienced significant growth, with a notable 62% increase in students expressing interest in pursuing a career in teaching through dual enrollment opportunities. While the data is not available, overall the state continues to see an increase in high school student participation in early college. Figure 3 and Figure 4 below show the increase in all dual enrollment.

Figure 3. Dual Enrollment Growth in Louisiana, 2020-2024.



Source: Louisiana Board of Regents, 2024

Figure 4. Dual Enrollment in Louisiana, 2023-2024.



Source: Louisiana Board of Regents, 2024



Aspiring Principal Fellowship and Recruitment and Retention Fellowship

The Aspiring Principal Fellowship has grown since 2021, with 129 total fellows to date. An additional 49 new participants have been selected for the 2024-2025 school year, representing Cohort 4.

The Recruitment and Retention Fellowship has been expanding since 2020, with 74 human resources professionals completing the program to date. Additionally, twenty-two (22) participants have been selected for the 2024-2025 school year to join Cohort 5.

Recovery

The teaching profession in Louisiana is currently facing significant challenges related to teacher retention, prompting the implementation of innovative strategies to support recovery and growth. Key initiatives include the development of a marketing toolkit by the Louisiana Department of Education (LDOE) to enhance school visibility and attract families and staff, as well as fellowships aimed at improving recruitment and retention rates. Additionally, the introduction of a registered apprenticeship program in teaching marks a pivotal step toward establishing high-quality pathways into the profession by emphasizing hands-on classroom experience and collaboration with local educational institutions.

Elevating the Profession: Marketing Toolkit

To better support the varying needs among schools and school systems in Louisiana, LDOE has developed a marketing toolkit. The toolkit will aid marketing and communications initiatives such as promoting the school system's accomplishments, attracting families and staff members, and improving the school system's visibility and reputation within the community. System leaders can access the

toolkit on the Department's new website as part of the System Leader Resources. The marketing toolkit provides school systems with the following:

Social Media Strategy & Templates

- Two-month content calendar with overarching content categories and posting cadence recommendations for a calendar year.
- A series of social media templates that schools/systems can update with relevant information and branding specific to their school.

Marketing Collateral Templates

- Series of templates, such as brochures, fliers/fact sheets, postcards, etc., for school systems to utilize.

Advertising Templates

- Two print ad templates, two digital ad templates, and two outdoor billboards.

Career Pipeline

This table highlights a rise in the Certified Mentor Teacher program sponsored by the Louisiana Department of Education.

Table 3. Career Pipeline.

| Goals | Progress | |
|--|--|---|
| | 2022-2023 | 2023-2024 |
| The number of certified Mentor Teachers will increase by 1,000, from 1,854 to 2,854, by July 2023. | As of July 2023, there were 2,633 credentialed mentors working in schools, an increase of <u>779</u> . | As of May 2024, there are 3,718 credentialed mentors working in schools, and 2,918 of those mentors hold teaching positions. This is an overall increase of <u>1,085</u> mentors. |

Fellowships

This table indicates that school systems in the Recruitment and Retention Fellowship sponsored by the Louisiana Department of Education improved retention rates and Aspiring Principal Fellows have moved into leadership roles.

Table 4. Fellowships.

| Goals | Progress | |
|--|---|---|
| | 2022-2023 | 2023-2024 |
| 80% of school systems represented in the Recruitment & Retention (HR) Fellowship will see an increase in overall retention rates in the school system. | 87% of school systems represented in the Recruitment and Retention Fellowship increased overall system-level retention rates. | Retention rates will be released with the Workforce Snapshot in March 2025. |
| 33% of the Aspiring Principal Fellows will have moved into a leadership position upon successful completion of the program. | 90% of Cohort 1 Aspiring Principal Fellows are presently serving in a school leadership position (Principal, Assistant Principal, Master Teacher, etc.). | 88% of Cohort 2 Aspiring Principal Fellows are presently serving in a school leadership position (Principal, Assistant Principal, Master Teacher, etc.). |

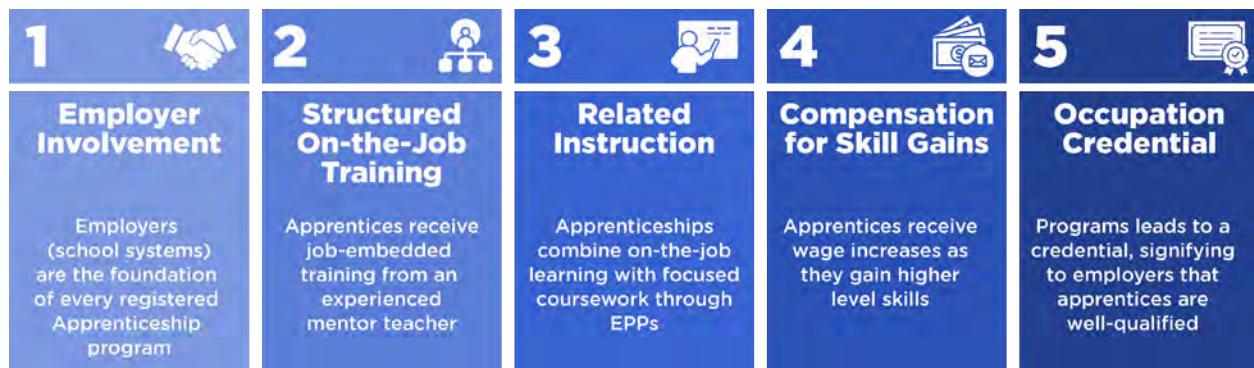
Elevating the Profession

Registered Apprenticeship in Teaching. In August 2023, the Department, in partnership with Tangipahoa Parish Schools and Southeastern Louisiana University, submitted to the Louisiana Workforce Commission the first competency-based registered apprenticeship in teaching.

Registered apprenticeship programs can be used to establish, scale, and build on existing high-quality pathways into teaching that emphasize classroom-based experience. Once established, registered apprenticeships can leverage financial resources from the U.S. Departments of Education and Labor as well as state workforce agencies to support this career pathway.

In May 2024, the Louisiana Workforce Commission approved the Department's sponsorship of a Registered Teacher Apprenticeship within Louisiana. The program will be piloted in 2024-2025, allowing Southeastern Louisiana University, Tangipahoa Parish Schools, and LDOE to develop, coordinate, and implement this program for the 2025-2026 school year. Once implemented and refined, the Department will seek other university partnerships and system employers to expand registered apprenticeships across Louisiana. The Department also supports this expansion by working with the Louisiana Workforce Commission to identify state and local workforce funding.

Figure 5. Registered Apprenticeship in Teaching Process.



Source: Louisiana Department of Education, 2023



Ms. Frances Shaw

Frances Davis Shaw has been teaching Louisiana's youth for more than 50 years. After retiring from Northside in 2012, she found herself teaching at other area schools, but Northside High School came calling because it was in dire need for a chemistry teacher. In 2024, at 80 years young, the legendary chemistry teacher returned to the classroom at Northside High.

"They said, 'the kids need you,'" according to Shaw. "That's a bad thing to say to a teacher!"

When she joined the faculty in 1972, she was among the first Black teachers at the formerly white high school and she helped guide Northside High through a tumultuous period of integration. So much has changed since Ms. Shaw first walked the halls of Northside High School, but her teaching remains the same – the highest service to generations of Louisiana's youth.

In November 2024, Frances was surprised as a "Louisiana Treasure." Lafayette native and CBS News Correspondent David Begnaud and sponsors honored her service to students and gifted her with \$100,000 – \$25,000 for her and another \$75,000 to fund the Frances Davis Shaw Community Impact Fund. Love Our Schools also gifted \$100,000 to Northside High School. The goal of the fund is to benefit the causes and organizations that Shaw cares about the most, and it will be housed at the Community Foundation for Acadiana.

Source: The Acadiana Advocate (November 15, 2024)



Retention

The Let Teachers Teach (LTT) initiative, led by Louisiana State Superintendent of Education Dr. Cade Brumley, aims to improve teacher retention and enhance the educational environment through strategic recommendations. Key measures include ensuring adequate classroom preparation time, transitioning mandated trainings to a cyclical model, and increasing flexibility in curriculum use. Legislative support, including acts to ban on-campus student cell phone use and provide additional teacher compensation, complement programs like the New Teacher Experience and Upbeat Principal Coaching. Collectively, these efforts empower educators and seek to improve student learning outcomes across Louisiana.

Let Teachers Teach

The Let Teachers Teach (LTT) workgroup was tasked with identifying common classroom disruptions and unnecessary bureaucracies, as well as formulating practical solutions to help educators focus on the most important aspect of their job: teaching students. The workgroup met four times during the spring of 2024. Eighteen recommendations were proposed and sorted into six categories: professional learning, required trainings, student behavior and discipline, non-academic responsibilities, curriculum and instruction, and planning.

Let Teachers Teach Recommendations (Top 10):

1. Ensure ample time for classroom preparation.
2. Shift legislatively mandated trainings to a cycle.
3. Decouple student behavior from the school accountability system.
4. Trust us—don't blame us.
5. Place ungovernable students at alternative sites for behavior support.
6. Limit student cell phone use
7. Pay teachers for additional non-academic work.
8. Stop forcing teachers to be mental health professionals.
9. Eliminate the mandate to read verbatim from teaching manuals, excluding direct instruction.
10. Abolish antiquated lesson planning requirements.

► Professional Learning

- Tailor Professional Growth Plans: Customize growth plans, with support from school leaders, based on individual teacher needs identified during formal observations.
- Make Collaboration Meetings Worthwhile: Facilitate meaningful weekly collaboration sessions for teachers to plan instruction based on student needs, which will combat professional isolation.
- Ensure Ample Time for Classroom Preparation: Provide uninterrupted time for teachers to prepare their classrooms before the school year begins.

► Required Trainings

- Shift Legislatively Mandated Training to a Cycle: Revise policies to update the frequency and duration of required training.
- Enact Pre-Test Exemptions: Allow teachers to bypass certain trainings if they pass a pre-test, saving time by eliminating redundant training.

► Student Behavior and Discipline

- Decouple Student Behavior from Accountability: Remove suspension rates from school accountability metrics.
- Trust Us—Don’t Blame Us: Remove excessively disruptive students from classrooms to maintain a conducive learning environment.
- Place Ungovernable Students at Alternative Sites: Provide behavior support at alternative sites for chronically disruptive students.
- Address Chronic Absenteeism: Collaborate with various stakeholders to create guidelines for managing absenteeism.
- Limit Cell Phone Use: Enforce policies requiring students’ devices to be off and put away during instructional time.

► Non-Academic Responsibilities

- Support Mental Health Challenges through Professionals: Ensure students have access to trained mental health professionals, with family engagement in recommendations.
- Stop Forcing Teachers to be Mental Health Professionals: Recognize that teachers are not licensed mental health professionals and should not bear this burden.
- Compensate Teachers for Non-Academic Work: Provide payment for teachers undertaking non-academic responsibilities, such as supervising extracurricular events.

► Curriculum and Instruction

- Eliminate Mandates to Read Verbally from Manuals: Allow teachers to use curricula as guidance rather than strict scripts, promoting flexibility in teaching.
- Create a Repository of High-Quality Resources: Improve accessibility to educational resources produced to teachers by LDOE.
- Provide Scheduling and Implementation Guidance: Offer additional support for scheduling and pacing core content areas to aid teachers.



► Planning

- Professional Autonomy for Effective Teachers: Grant autonomy to proficient teachers to tailor lessons to meet their students' needs.
- Abolish Antiquated Lesson Planning Requirements: Modernize lesson planning to reflect authentic teaching practices and reduce unnecessary paperwork.

These recommendations will empower educators, enhance their professional experience, and ultimately improve student learning outcomes.

The New Teacher Experience

The New Teacher Experience is a comprehensive induction program that offers multiple services designed to increase teacher effectiveness, enhance skills, and reduce attrition among beginning teachers. The New Teacher Experience provides both direct supports to teachers and system supports to improve student achievement by improving beginning teacher effectiveness and teacher retention.

Through this program, Louisiana teachers are provided with a series of supports to ensure their retention in the profession and their development and growth as effective educators.



- Direct Teacher Supports
- Professional Learning Modules
- Collaborative Clusters
- Mentoring
- District Supports
- Guidance Documents for New Teacher Induction
- Guidance Documents for Mentor Teachers
- Quarterly Support Calls
- New Teacher of the Year Award

The New Teacher Experience: Professional Learning Modules

LDOE, in partnership with A+PEL, has developed professional learning modules on topics that are critical for new teacher success. These modules include online asynchronous content that new teachers are able to complete independently as well as opportunities to practice and apply these concepts during in-person Professional Learning Labs.

- Module 1: Classroom Management
- Module 2: Standards and Curriculum
- Module 3: Data Literacy
- Module 4: Literacy for the 21st-Century Learner
- Module 5: Parent and Community Engagement

In 2023-2024, 453 new teachers registered for this professional learning opportunity.

Affinity Groups

The New Teacher Experience also provided collaboration opportunities for new teachers by establishing Affinity Groups for them. These virtual groups, which were linked by content and grade level, met monthly to discuss challenges, successes, curriculum and strategies. These groups were led by outstanding educators from across the state.

The goals of these groups include the following:

- Link new teachers by a common purpose or interest
- Ensure an inclusive environment in which new teachers are valued, included, and empowered to succeed
- Improve teachers' craft through discussion, collaboration, and purposeful materials and leadership in each group

In 2023-2024, 291 new teachers registered to be a part of these Affinity Groups.

The New Teacher of the Year

The New Teacher Experience elevates the role of beginning teachers by annually bestowing a New Teacher of the Year award. This program recognizes the outstanding contributions of a **first-year** teacher.

In 2023-2024, over 80 applications were submitted, which represented 26 school systems. In addition, LDOE celebrated and recognized nine state finalists for New Teacher of the Year by appointing them to an advisory role for the New Teacher Experience.



LEAN for Education Leaders Collaborative. In the fall of 2023, 40 school leaders participated in a collaborative. Each participant received an overview of LEAN practices and implemented a LEAN initiative within their school.



School leaders tackled issues related to discipline, dismissal, student attendance, teacher attendance, and parent communication on their campus. Using LEAN practices, they developed more comprehensive and streamlined processes, enhancing student outcomes by reducing extraneous expectations placed on teachers beyond the core work of teaching and learning.

Upbeat Principal Coaching Support for Environment and Morale

LDOE partnered with Upbeat, a company that engages and retains teachers and staff by providing a unique research-based employee survey and coaching services. This partnership was designed as a part of the state's recruitment and retention strategy to support school leaders in establishing positive, inclusive schools that foster strong retention and staff morale.

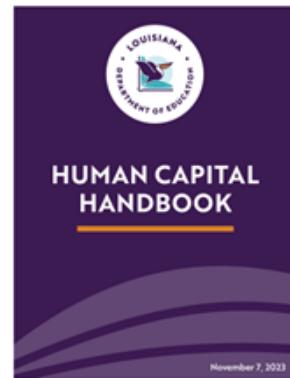
The Upbeat team administered an expert-designed, research-based survey twice in the 2023-2024 school year, once in the fall and then again in the spring, for 125 schools in Louisiana at no cost to the schools/systems. After each survey, the administration, an Upbeat coach, and all experienced administrators worked with school system leadership teams and administrators to analyze the results, identify strengths, and develop action plans to address areas identified for improvement.

Ultimately, 2,706 teachers from 126 schools and 14 systems completed the Engagement Survey, with a 72% completion rate across all systems. Over 95% of principals reported that the data they received from the survey and the coaching from Upbeat gave them insights and were helpful as they worked to accomplish their goals.

Human Capital Handbook and Professional Learning

LDOE has worked with the national nonprofit the Urban Schools Human Capital Academy to develop a Human Capital Handbook to provide school systems with information, strategies, and tools to improve human capital systems related to the following topics:

- Use of data to drive decision-making and measure progress/impact
- Recruitment strategies
- Hiring and selection (including projection analysis)
- New teacher support/induction
- Principals as human capital leaders
- Retention and career management strategies (including succession planning)
- Sustainable staffing strategies
- The cycle of driving improvement



The Human Capital Handbook will be reviewed by Louisiana Human Resource professionals across the state. It will include innovative strategies and programs currently in place in school districts that have proven to be successful.

Conclusion

In conclusion, the initiatives detailed in this report reflect the Task Force's steadfast commitment to elevating the teaching profession in Louisiana. By implementing innovative recruitment strategies, enhancing support mechanisms, and prioritizing professional development, we are working to establish a sustainable and diverse pipeline of qualified educators. It is imperative that we continue to foster collaboration among all stakeholders to ensure the successful execution of these initiatives. Together, we can create an educational landscape that not only attracts and retains exceptional talent but also significantly enhances the learning outcomes for all students across our state.

Appendix A

HCR No. 39

ENROLLED

2021 Regular Session

HOUSE CONCURRENT RESOLUTION NO. 39

BY REPRESENTATIVE MINCEY AND SENATORS ABRAHAM, BARROW, BOUDREAUX, BOUIE, CATHEY, CONNICK, FIELDS, HEWITT, JACKSON, LAMBERT, MCMATH, ROBERT MILLS, MORRIS, PEACOCK, POPE, TALBOT, AND WOMACK

A CONCURRENT RESOLUTION

To create the Teacher Recruitment, Recovery, and Retention Task Force to study the declining enrollment in teacher preparation programs and to study strategies and best practices by which the state and individual school districts where there are teacher shortages can increase rates of employment and retention of teachers and to provide a written report of findings and recommendations to the governor, state superintendent of education, president of the State Board of Elementary and Secondary Education, House Committee on Education, and Senate Committee on Education not later than January 14, 2022.

WHEREAS, the number of education degrees conferred by American colleges and universities dropped by twenty-two percent between 2006 and 2019, despite an overall increase in university graduates; and

WHEREAS, many public school systems throughout the state of Louisiana have experienced a decline in teacher applicant pools, especially in the subjects of mathematics and science and in special education; and

WHEREAS, school systems must proactively seek to overcome employment challenges by maintaining strong school leaders, positive work environments, and competitive compensation packages; and

WHEREAS, the current shortage of teachers is a statewide concern among districts; it is essential that Louisiana attract the most talented and ambitious teachers in the country to our schools; and

Appendix A

HCR No. 39

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| <p>HCR NO. 39</p> <p>WHEREAS, the members of the Legislature of Louisiana believe that structured dialogue and engagement will illuminate the path forward in facing this challenge.</p> <p>THEREFORE, BE IT RESOLVED that the Legislature of Louisiana hereby creates the Teacher Recruitment, Recovery, and Retention Task Force to research strategies to overcome the state's current and future teacher shortage challenge and secure a stronger educator workforce.</p> <p>BE IT FURTHER RESOLVED that the task force shall be composed of the following members:</p> <p class="list-item-l1">(1) The chairman of the House Committee on Education or his designee.</p> <p class="list-item-l1">(2) The chairman of the Senate Committee on Education or his designee.</p> <p class="list-item-l1">(3) A representative of the Louisiana Department of Education designated by the state superintendent of education.</p> <p class="list-item-l1">(4) The commissioner of higher education or his designee.</p> <p class="list-item-l1">(5) A representative of the Louisiana School Boards Association designated by the governing authority of the association.</p> <p class="list-item-l1">(6) A representative of the Louisiana Association of School Executives designated by the governing authority of the association.</p> <p class="list-item-l1">(7) The president of the State Board of Elementary and Secondary Education or his designee.</p> <p class="list-item-l1">(8) A representative of the Louisiana Association of School Superintendents designated by the governing authority of the association.</p> <p class="list-item-l1">(9) A representative of the Louisiana State Association of School Personnel Administrators designated by the governing authority of the association.</p> <p class="list-item-l1">(10) A representative of the Louisiana Association of Colleges for Teacher Education designated by the governing authority of the association.</p> <p class="list-item-l1">(11) A representative of the Associated Professional Educators of Louisiana, who is a certified teacher with one to five years of classroom experience, designated by the governing authority of the association.</p> <p class="list-item-l1">(12) A representative of the Louisiana Federation of Teachers, who is a certified teacher with six to twenty years of classroom experience, designated by the governing authority of the federation.</p> | <p style="text-align: right;"><u>ENROLLED</u></p> |
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Appendix A

HCR No. 39

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| HCR NO. 39 | <u>ENROLLED</u> |
| | <p>(13) A representative of the Louisiana Association of Educators, who is a minority certified teacher with at least five years of classroom experience, designated by the governing authority of the association.</p> |
| | <p>(14) The president and chief executive officer of the Council for A Better Louisiana or his designee.</p> |
| | <p>(15) The executive director of the Louisiana Association of Public Charter Schools or his designee.</p> |
| | <p>(16) The president of the Senate or his designee.</p> |
| | <p>(17) The speaker of the House of Representatives or his designee.</p> |
| | <p>BE IT FURTHER RESOLVED that the commissioner of higher education shall be responsible for designating Board of Regents staff to assist the task force in performing its duties, shall serve as co-chair of the task force, and shall call the first meeting of the task force, which shall be held not later than July 16, 2021, and at which the task force shall adopt rules of procedure, a work schedule, and any additional measures that it deems necessary for the timely performance of its duties, including selection of another co-chair and other officers.</p> |
| | <p>BE IT FURTHER RESOLVED that the termination date of the task force shall be two years after the convening of its first meeting.</p> |
| | <p>BE IT FURTHER RESOLVED that members of the task force shall serve without compensation.</p> |
| | <p>BE IT FURTHER RESOLVED that the task force shall submit a written report of findings and recommendations, including proposed legislation, relative to why the number of university-level students majoring in education has declined, why teachers are leaving the profession, and what can be done to reverse the trend toward a teacher workforce shortage.</p> |
| | <p>BE IT FURTHER RESOLVED that the report shall be submitted to the governor, the state superintendent of education, the House Committee on Education, the Senate Committee on Education, the president of the State Board of Elementary and Secondary Education, and the commissioner of higher education by January 14, 2022, and that such recommendations shall include but not be limited to exploring answers to the following questions:</p> |
| | <p>(A) Recruitment:</p> |

Appendix A

HCR No. 39

| HCR NO. 39 | <u>ENROLLED</u> |
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| | <p>(1) How many university-level students are poised to become teachers over the next few years?</p> <p>(2) How many students are in teacher preparation programs, disaggregated by elementary, junior high, and high school levels?</p> <p>(3) What can be done to recruit high school students to major in education with the intention to pursue a career teaching math or science?</p> <p>(4) What can be done to increase high school students' interest in pursuing teaching?</p> <p>(5)(a) How is the one-year residency program affecting fourth year university-level students majoring in education?</p> <p>(b) What are the consequences of university-level students majoring in education changing their major to avoid the residency program?</p> <p>(c) How many students change from an education major to a different major?</p> <p>(6)(a) Is there an adequate number of mentor teachers for residency programs?</p> <p>(b) If no, why has the number declined?</p> <p>(7) What best practices for recruiting people to the teaching profession are working in other states?</p> <p>(B) Recovery:</p> <p>(1) Why have teachers retired early or resigned since 2012?</p> <p>(2) What are the results from exit interviews of teachers who leave school districts?</p> <p>(3) What are the results of class measures surveys conducted throughout the state?</p> <p>(4) How have the inadequacies of accountability evaluations affected teacher morale?</p> <p>(5) How has a lack of pay raises affected teacher morale?</p> <p>(6) What best practices for preventing teacher burnout are working in other states?</p> <p>(C) Retention:</p> <p>(1) How many of the following are teaching in the state?</p> <p>(a) Certified teachers</p> <p>(b) Uncertified teachers</p> <p>(c) Teachers with an alternative certification</p> <p>(d) Teachers with a temporary teaching assignment designation</p> <p>(2) How many teachers will be eligible for retirement by 2026?</p> |

Appendix A

HCR No. 39

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| HCR NO. 39 | <u>ENROLLED</u> |
| | (3) What can be done to increase the number of minority teachers? |
| | (4) How have increased documentation requirements affected teacher morale? |
| | (5) What best practices for retaining teachers are working in other states? |
| <hr/> <p>SPEAKER OF THE HOUSE OF REPRESENTATIVES</p> <hr/> <p>PRESIDENT OF THE SENATE</p> | |
| Page 5 of 5 | |

Appendix B

HCR No. 17

ENROLLED

2023 Regular Session

HOUSE CONCURRENT RESOLUTION NO. 17

BY REPRESENTATIVE MINCEY

A CONCURRENT RESOLUTION

To continue and provide with respect to the Teacher Recruitment, Recovery, and Retention Task Force that was created pursuant to House Concurrent Resolution No. 39 of the 2021 Regular Session of the Legislature.

WHEREAS, the Teacher Recruitment, Recovery, and Retention Task Force was created in the 2021 Regular Session pursuant to House Concurrent Resolution No. 39 to study the declining enrollment in teacher preparation programs and to study strategies and best practices by which the state, and individual school districts where there are teacher shortages, can increase rates of employment and retention of teachers; and

WHEREAS, the task force has met ten times since its inception, bringing together key stakeholders who have contributed greatly to its work; and

WHEREAS, the task force released a preliminary report in December 2021 and a final report in January 2023 which included responses to research questions posed in House Concurrent Resolution No. 39 and demonstrated a commitment to strengthening the pipeline of great teachers into classrooms across Louisiana; and

WHEREAS, there remain opportunities for the task force to help address teacher shortages and identify ways to improve employment and retention of teachers in Louisiana.

THEREFORE, BE IT RESOLVED that the Legislature of Louisiana does hereby continue the Teacher Recruitment, Recovery, and Retention Task Force through July 13, 2025.

BE IT FURTHER RESOLVED that the task force shall submit written reports of its findings and recommendations.

Appendix B

HCR No. 17

HCR NO. 17

ENROLLED

BE IT FURTHER RESOLVED that the reports shall be submitted to the governor, the state superintendent of education, the House Committee on Education, the Senate Committee on Education, the president of the State Board of Elementary and Secondary Education, and the commissioner of higher education by February 1, 2024, and February 1, 2025.

SPEAKER OF THE HOUSE OF REPRESENTATIVES

PRESIDENT OF THE SENATE

Appendix C

Louisiana Department of Education's Birth-Grade 12 System Planning Process

Each year, school systems and lead agencies plan for how to improve student learning in the coming year. This process is aligned with our Vision for Success and involves:

- Reviewing student achievement and progress data, establishing priorities,
- Aligning budgets to these priorities, and
- Using all available funding sources.

Super App is the single birth through graduation plan that, when approved, gives each school system access to federal formula and competitive dollars and fulfills the federal requirement for each school system's ESSA plan.

This application includes funding for the core components of school improvement at Comprehensive Intervention Required (CIR), Urgent Intervention Required - Academics (UIR-A), and Urgent Intervention Required - Discipline (UIR-D) sites.

School systems with CIR and UIR schools have requirements in order to have an approved plan and unlock funding. This year, school systems will be required to implement at least two career pipeline strategies of the state's recruitment and retention strategy at the local level (see last bullet).

- Strategy 1: Enroll paraprofessionals in the para-to-teacher training program.
- Strategy 2: Enroll new teachers in the New Teacher Experience.
- Strategy 3: Apply for a registered apprenticeship in teaching.
- Strategy 4: Increase compensation for employees.
- Strategy 5: Partner with an educator preparation program to increase certification rates.
- Strategy 6: Implement or expand the Pre-Educator Pathways in high schools.
- Strategy 7: Enroll the Human Capital Leader in the Recruitment and Retention Fellowship.

As part of the application, systems will utilize the EdLink Workforce and Vacancy Dashboards to input workforce data for their school system along with selecting at least two strategies to improve recruitment and retention. Systems will receive funding for implementation.

These plans are due in January 2024, and approval and funding will be implemented in April 2024. These plans will be implemented by school systems during the 2024-2025 school year.

Appendix D

Task Force Roster

| Member | Seat Information |
|-------------------------|--|
| Rep. Barbara Freiberg | (1) The chairman of the House Committee on Education or his designee |
| Sen. Beth Mizell | (2) The chairman of the Senate Committee on Education or his designee |
| Dr. Arthur Joffrion | (3) A representative of the Louisiana Department of Education designated by the state superintendent of education |
| Dr. Kim Hunter Reed | (4) Commissioner of Higher Education |
| Dr. Janet Pope | (5) A representative of the Louisiana School Boards Association designated by the governing authority of the association |
| Dr. Karen Peace | (6) A representative of the Louisiana Association of School Executives designated by the governing authority of the association |
| Ronnie Morris | (7) The president of the State Board of Elementary and Secondary Education or his designee |
| Mike Faulk | (8) A representative of the Louisiana Association of School Superintendents designated by the governing authority of the association |
| Bruce Chaffin | (9) A representative of the Louisiana State Association of School Personnel Administrators designated by the governing authority of the association |
| Dr. Paula Calderon | (10) A representative of the Louisiana Association of Colleges for Teacher Education designated by the governing authority of the association |
| [VACANT] | (11) A representative of the Associated Professional Educators of Louisiana, who is a certified teacher with one to five years of classroom experience, designated by the governing authority of the association |
| Cynthia Posey | (12) A representative of the Louisiana Federation of Teachers, who is a certified teacher with six to twenty years of classroom experience, designated by the governing authority of the federation |
| Gladys Mouton | (13) A representative of the Louisiana Association of Educators, who is a minority certified teacher with at least five years of classroom experience, designated by the governing authority of the association |
| Barry Erwin | (14) The president and chief executive officer of the Council for A Better Louisiana or his designee |
| Alex Jarrell | (15) The executive director of the Louisiana Association of Public Charter Schools or his designee |
| Sen. Rick Edmonds | (16) The president of the Senate or his designee |
| Rep. Shaun Raphael Mena | (17) The Speaker of the House of Representatives or his designee |

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