



BOARD of REGENTS
STATE OF LOUISIANA

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

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

CALL TO ORDER

Dr. Mark McLean called the meeting to order at 10:09 a.m.

ROLL CALL

Ms. Elizabeth Bentley-Smith called roll and a quorum was established.

APPROVAL OF OCTOBER MINUTES

On motion of Dr. Samuel Gladden, seconded by Ms. Gena Doucet, the minutes were approved.

PRESENTATION OF RETURN-TO-WORK RECOMMENDATIONS

TRSL

Katherine Whitney, Executive Director

- Ms. Whitney provided an overview of the Return-to-Work (RTW) study group's preliminary recommendations for the Phased Retirement Taskforce as it develops recommendations related to HR 143.
- She noted that higher education does not utilize return-to-work as much as K-12, but this is increasing.
- She added that the RTW study group reviewed current return-to-work provisions and looked for ways to simplify and create balance by providing retirees with options and employers with the ability to fill vacancies.
- The group focused on 12-month waiting period, which is in place to help with actuarial costs.
- Ms. Whitney stated that suspension of benefits upon returning to work will remain, though retirees can earn a supplemental benefit.
- The group recommends increasing the earnings limit from 25% to 50% of the final average compensation.
- The study group also recommends implementing an age-based provision with no impact to the retirement benefit upon reaching the age of 65.
- Ms. Whitney noted these recommendations should open the door for higher education to increase usage of return-to-work.

- The RTW study group recommends changes to the contract/corporate contract provision. For postsecondary institutions, reemployment through a contact or corporate contract is subject to RTW laws when the retiree is reemployed as professor, adjunct professor, instructor, or researcher.

DISCUSSION OF PHASED RETIREMENT PLAN OPTION RECOMMENDATIONS

- Ms. Bentley-Smith reviewed the language of the recommendation.
 - Ms. Doucet asked if a policy must be adopted by each system. Ms. Bentley-Smith responded that each system would need to have a policy, but the policy contents would be determined by the management board.
- Ms. Bentley-Smith reviewed the eligibility requirement recommendations.
 - Mr. Kenny Herbold recalled that the length of enrollment would be a minimum of 12 months and reviewed annually.
 - Mr. Tommy Smith stated that a three-year agreement should not need to be reviewed each year.
 - Ms. Desiree Honore Thomas suggested adding language stipulating no extensions past 36 months.
 - Ms. Thomas expressed concern that discretion is left to system to determine whether unclassified staff members can participate. Mr. Smith suggested that individual systems make this decision. Dr. Gladden asked about the impact of an employee moving from one system to another. Mr. Trey Roche asked who would be the final decision maker. Ms. Bentley-Smith noted that this would be a system decision based on its individual needs. She provided an example of a librarian who is classified as staff at one institution and faculty at another.
- Ms. Bentley-Smith reviewed the service requirement and asked whether everyone was comfortable with the guardrails.
 - Ms. Beth Alford suggested including the clarification that service must be in the public higher education system.
 - Dr. Ghirmay Ghebreyesus asked about the age limit of 59 ½, and it was noted that the age is aligned with IRS limits.

- Dr. Gladden asked about length of service in higher education and whether it is specific to service in a public higher education system in Louisiana. Ms. Bentley-Smith stated that it is specific to service in a Louisiana public higher education system.
- Mr. Roche suggested adding that participants must meet TRSL retirement eligibility requirements.
- Ms. Bentley-Smith reviewed the MOU and dual employment.
 - Dr. Gladden asked how dual employment is defined. Ms. Bentley-Smith stated that the definition included employed within two systems and that she would add language to clarify. Mr. Roche stated that dual employment not allowed in another TRSL-eligible position.
 - Mr. Smith noted there could be others enrolled in LASERS and suggested adding language stating that dual employment is not allowed in another state retirement system.
- Ms. Bentley-Smith reviewed the rehire time frame and asked for comments or concerns.
 - Ms. Doucet suggested adding staff in case systems decide to include both faculty and staff.
 - Mr. Herbold asked about retirement status and whether an employee is considered retired from a TRSL perspective when entering into phased retirement agreement. Mr. Roche responded that this depends on how the law is written. If an employee wants to keep full benefits, they need to be considered full-time active employees.
- Ms. Bentley-Smith reviewed the time-period for implementation. There were no issues with the suggested language.
- Ms. Bentley-Smith reviewed the salary and retirement benefits to be received during phased retirement and asked for questions or concerns.
 - Dr. Gladden asked about possible furloughs.
 - Ms. Bentley-Smith suggested including language that base salary will remain static.
 - Mr. Roche noted the first bullet related to ORP and stated that a separate bullet is needed because ORP account balances change.

- Dr. McLean asked Ms. Doucet about DROP related to salary. She stated that DROP participants receive salary increases, but their retirement benefits are already defined.
- Dr. Fuller asked about accrued leave and how it would work in a phased retirement program. Task Force members indicated that phased retirement participants should continue to accrue leave based on their work effort. Ms. Bentley-Smith agreed to add language to the recommendation to allow participants to accrue leave based on their work effort during phased retirement.
- Ms. Bentley-Smith reviewed the potential of providing additional lifetime income.
 - Ms. Doucet asked if an ORP participant would continue to contribute to ORP and Ms. Bentley-Smith affirmed that they would.
 - Mr. Roche asked about the first bullet regarding annuity. Dr. McLean stated that this bullet may not be needed and moved to strike it.
 - Dr. Gladden suggested that staff review the use of ‘may’ and ‘shall’ in the recommendations. Dr. McLean asked for comments from the group regarding ‘may’ and ‘shall’.
 - Mr. Roche suggested adding a bullet for ORP participants.
 - Tommy Smith suggested it is not fair that a participant would contribute if they will not get years of service. Mr. Roche responded that they must pay into something.
 - Ms. Doucet stated that the Task Force needed to decide if phased retirement should be looked at like DROP or RTW. The members discussed DROP in comparison to Phased Retirement. Mr. Herbold stated there is no EE contribution for DROP, the retirement payment goes into DROP account.
 - Mr. Smith asked if Defined Benefit (DB) plans would be treated different from Optional Retirement Plans (ORP). Mr. Roche asked if ORP and DB should be treated the same.
 - Ms. Doucet suggested that DB be treated like DROP, with no contributions, while ORP would be left to participants, though the employer would still contribute.
 - Mr. Eddie Meche asked about supplemental pay. Mr. Roche stated that when working past DROP, the employee starts accruing a supplement.

- Ms. Bentley-Smith stated issue at hand is determining how ORP members would continue to contribute. Dr. Tirone questioned the incentive to participate and suggested requiring ORP members to continue contributions during phased retirement.
- Mr. Smith clarified that the employer does not continue to contribute when an employee is in DROP and should not contribute to the defined benefit plan. The Task Force agreed.

DISCUSSION OF ORP CONTRIBUTION RATE AND ACCRUED LEAVE ENHANCEMENT RECOMMENDATIONS

- Ms. Bentley-Smith reviewed a recommendation to increase the employer rate from 6.2% to 8%.
 - The Task Force discussed strongly recommending, rather than requiring, an increase in the employer contribution rate. Mr. Smith asked whether the recommendation should be linked to funding appropriations. Ms. Bentley-Smith agreed to add the suggested language to the recommendation.
- Ms. Bentley-Smith reviewed the recommendation to shift the payment of the TRSL administrative fee from ORP members to employers, contingent on legislative funding.
 - Dr. Gladden asked about cost and suggested changing the slide's heading. Ms. Bentley-Smith explained that heading reflects what task force is responsible for reviewing.
- Ms. Bentley-Smith discussed the potential cost of providing a greater payout by using accrued leave to enhance a participant's benefit.
 - Mr. Smith stated that LSU A&M calculated an additional cost of up to \$300,000 to the flagship.
 - Ms. Bentley-Smith asked if the Task Force is comfortable recommending 600 hours for ORP participants. All systems agreed with the recommendation. Ms. Doucet suggested referencing the statute on leave payout.

FUTURE MEETING DATES

- Ms. Bentley-Smith asked if December 9th would work for the final meeting. After discussion, December 16th was agreed upon as the meeting date.

OTHER BUSINESS

- There was no other business.

ADJOURNMENT

On motion of Dr. Fuller, seconded by Ms. Doucet, the meeting was adjourned at 11:31 a.m.