

Teacher Recruiting and Retention Task Force

Illinois State Board of Education (ISBE)
State Board Room, Third Floor
100 North First Street
Springfield, Illinois

Tuesday, February 17, 2015

MINUTES

Call to Order:

Senator John Sullivan, Co-Chair, called the meeting to order at 8:34 a.m. A quorum was present.

Facilitation Committee Member(s) Present:

Senator John Sullivan, Co-Chair
Representative Chapa LaVia, Co-Chair (on the phone)
Brittany Archibald
Steve Grossman (on the phone) ?
Richard Ingram
Frank Mott
Senator Jim Oberweis (on the phone) ?
Senator Chapin Rose (on the phone)?
Representative Barb Wheeler
Dr. David Shuler (on the phone)

Committee Member(s) Absent:

Representative Frances Hurley
Representative John Anthony
Dr. Vinni Hall

Review of Business Meeting Agenda:

There were no modifications made to the business meeting agenda.

- I. Introductions
- II. Approval of Minutes
 - Correction to number III first bullet point – changed 6% to 7% and strike third sentence that read “In 2016, Tier II will be vested.”

Richard Ingram moved that the Teacher Recruiting and Retention Task Force accept the corrected minutes of the November 8, 2014 meeting. Jason Helfer seconded the motion. Senator John Sullivan called for discussion, but none followed. The motion passed by unanimous vote.

- III. Review of last meeting
 - Jason Helfer discussed two survey draft handouts.
 - 1- Teachers survey
 - 2- Superintendent/HR survey
 - The surveys will assist the Task Force in determining the impact of House Joint Resolution 27 which requires the Task Force to study the impact of Tier

2 pension benefits on the ability of school districts to recruit and retain teachers in public school classrooms. Per House Joint Resolution 27, Tier 2 members are public employees hired on or after January 1, 2011.

- Surveys will be sent to all Task Force members.
- Concerns of surveying
 - Surveys may not tell much regarding retention per Jason Helfer.
 - Non-related data example of #5 question on Teacher Survey Draft may be arbitrary.
 - Question 5 – When you accept a position in your district, what were your reasons for doing so (please rank order)
 - A young, new educator may not rank ‘Pension’ as being important at this time in their life
 - Most newly graduated educators are seeking employment for experience or a paycheck regardless of district location and may rank ‘location’ and or ‘Salary and benefits’ high
 - Population to be surveyed?
 - High School Seniors? Under 18 may not be permitted. Concern that students may not go into education because salary isn’t a number they prefer/want. Jason Helfer mentioned that the Illinois Education Research Council (IERC) has data on the Illinois High School Class of 2002 which shows participation and completion patterns in postsecondary education after high school.
 - Community Colleges and State Teaching Preparation Approved Program completers? This population would be those who are making a commitment.
 - Richard Ingram asks “Schools of Education do educators tend to stay in their residing state? And, do educators stay to teaching within their state where they earned their degree?”
 - Jason Helfer informed that Southern University of Illinois-Edwardsville has collected new data which states approximately 10-15% of students go out of state for their teaching education but return back to their home state after 10 years. Jason will check to see if SIU-Edwardsville will share their findings.
 - Institutions of Higher Education have seen lower numbers in the last five (5) years into teacher preparation programs.
 - Educator at Exit interview? Task Force agrees that the Superintendent/HR survey to exiting educators could be constructive and reflect issues the Task Force is examining. Frank Mott suggests cause and effect and to remove as many variables as possible. He suggested two areas for comparison/correlations.
 - Number of educators going into teaching in IL versus Number of educators going into teaching in other states after Tier 2 implementation
 - Number of retirement systems of new teachers enrolling before and after the implementation of Tier 2 in IL
 - Frank Mott asks, “Is there a decrease after Tier 2?” If No, then we may not need to proceed as Tier 2 isn’t having an effect.

- Richard Ingram stated budget issue may be extraneous; especially the relationship between local budget and state budget.
- Representative Wheeler asked: Is retirement a retention issue? Are the teachers noticing they can't/aren't earning a benefit? In 5-7 years do people typically drop off?
 - Both Richard Ingram and Representative Wheeler suggest if no, then it may be too soon.
- Kathleen Farney informed that inactive statistics include anyone who has substitute taught for one (1) day and doesn't return to teaching.
- Compliance issue?
 - The amended dissolution has yet to be filed and changes can still be made per Amanda Elliott.
 - Impact of Tier 2
 - Compliance Issue
 - Legal (financial bottom line) versus shortage of educators (which may or may not happen)
 - Richard Ingram states that subsidy of state costs by Tier 2 paying Tier 1 members thus an inequity/moral issue.
 - Impact on recent fiscal analysis of SB1 if excess contributions is eliminated
 - Task Force members agree that there is an administrative burden to review each educator individually.
 - Senator Sullivan asked: If Tier 2 isn't compliant will IRS give legal ruling per non-compliance? Kathleen Farney answered: yes, if a person failed the 'safe harbor test' of compliance the educator would owe the social security tax. Richard Ingram informed that currently no one has yet to fail the IRS 'safe harbor test'.
 - TRS discussed two document handouts:
 - 1- Transactions Related to Teaching Service in Illinois and Other States since 2003
 - 2- Summary of TRS Solvency Projections performed by Buck Consultants, November 2014
 - TRS documents will be sent to all Task Force members.
 - Kathleen Farney and Richard Ingram reviewed Document 1 page 4, 'Hypothetical TRS Tier 2 Members and Social Security Safe Harbor Test (Revenue Procedure 91-40)'
 - Tier 1 vested in 5 years
 - Tier 2 vested in 10 years
 - Inflation creates moveable date
 - Two issues: Issue 1- Tier 2 members are paying 9.4% with a 7% valued benefit and Issue 2- Social Security benefit accrual test
- Recruitment vs Retention
 - Senator Sullivan reflects on two issues:
 - 1- Recruitment – school districts to fill positions
 - 2- Retention – only to be answered by the educator
 - Nick Yelverton states that both recruitment and retention need to be analyzed and look at other factors

IV. Discussion of data and data collection

- A review of TRS Document 1) Transactions Related to Teaching Service in Illinois and Other States since 2003 of pages 1, 2 and 3.
- Representative Wheeler asked “Do you have to be a part of the retirement system or can you opt out?” Richard Ingram stated “No, you are required to buy in.”

V. Discussion of resolution

- Representative Wheeler asked “What is the resolution of impact? The assumption of Tier 2 being negative?” Helfer

Senator John Sullivan motioned to have TRS provide documentation that will accompany the Teacher Recruiting and Retention Task Force report to the General Assembly that would include remedies, recommendation and budgetary issues for the compliance issue that pertains to the IRS. Representative Barb Wheeler seconded the motion. The motion passed by unanimous vote.

Senator John Sullivan motioned to have the Illinois State Board of Education supply another draft of the Senate Joint Resolution to remove the compliance issue and implication; and the resolution extend reporting date on or before September 1, 2015. Representative Barb Wheeler seconded the motion. The motion passed by unanimous vote.

Senator John Sullivan motioned that the Teacher Recruiting and Retention Task Force agrees the resolution that Senator John Sullivan will introduce with passage with resolution on or before September 1, 2015. Richard Ingram seconded the motion. The motion passed by unanimous vote.

VI. Conclusion

- Surveys and TRS documentation will be provided to all Task Force members before next meeting.
- Ms. Elliott will amend resolution and provide draft at next meeting.
- Task Force will meet on March 17 at 8:30 a.m.

Adjournment:

Senator John Sullivan moved that the Teacher Recruiting and Retention Task Force meeting adjourn. Representative Barb Wheeler seconded the motion. The motion passed by unanimous vote. The Task Force meeting adjourned at 10:04 a.m.