



TEXAS PENSION REVIEW BOARD

EDUCATION COMMITTEE MEETING

MAY 20, 2026

TEXAS PENSION REVIEW BOARD

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**TEXAS PENSION REVIEW BOARD
EDUCATION COMMITTEE MEETING AGENDA**

**Wednesday, May 20th, 2026 – 2:00 PM
William P. Clements Building, Fourth Floor, Room 402
300 W. 15th Street, Austin, TX, 78701**

Committee members may attend this meeting by videoconference pursuant to Section 551.127, Texas Government Code. One or more committee members, including the presiding officer, will be physically present at the physical location of the meeting listed above. The meeting will be accessible to the public at the physical location listed above. The public may access the meeting virtually by joining via the Zoom link: <https://us02web.zoom.us/j/83727037871>. A livestream of this meeting, materials of the meeting, and a recording of the meeting will be made available at www.prb.texas.gov.

The Committee may discuss or take action regarding any of the items on this agenda.

1. Meeting called to order
2. Roll call of committee members
3. Consideration and possible action to approve July 10, 2025, meeting minutes
4. Opening remarks from committee members
5. Public comment
6. Overview of potential changes to the Minimum Educational Training program to improve compliance
7. Future meetings: Agenda items, dates, locations, and related matters
8. Adjournment

NOTE: The committee may go into closed session concerning any item on this agenda as authorized under the Texas Open Meetings Act, Chapter 551, Texas Government Code. Persons with disabilities who plan to attend this meeting and who may need special assistance are requested to contact Jessimond McLaughlin at (512) 463-1736 as far in advance as possible, but no less than three business days prior to the meeting date, so that appropriate arrangements can be made.

How to provide public comment: Members of the public who wish to provide public comment to the committee may attend the meeting in person at the address above or using the Zoom link provided above. If you wish to provide comment remotely by Zoom, you must contact Jessimond McLaughlin (jessimond.mclaughlin@prb.texas.gov) no later than Monday, May 18, 2026. Note that public comments will be limited to no more than three minutes.

Item 3. July 10, 2025 meeting minutes





Education Committee Minutes

July 10, 2025

1. Meeting called to order (00:02)

The Pension Review Board (PRB) Education Committee meeting was called to order Thursday, July 10, 2025, at 2:04 p.m. in the Capitol Extension, Committee Room E1.012, 1100 N. Congress Avenue, Austin, Texas, 78701.

2. Roll call of committee members (00:14)

Chair Marcia Dush and Roy Rodriguez attended in person. Chris Gonzales attended virtually. A quorum being present, the meeting was called to order by Chair Dush.

3. Consideration and possible action to approve May 9, 2024, meeting minutes (00:47)

Chair Dush entertained a motion to suspend the reading of minutes of the May 9, 2024, meeting and approve them as circulated.

The motion was made by Chris Gonzalez and seconded by Roy Rodriguez.

The motion passed unanimously.

4. Public comment (01:34)

There were no public comments.

5. Educational Services Survey Report and feedback (02:01)

Policy and Communications Manager Mariah Miller presented the Educational Services Survey results. The survey achieved an 8.35 percent response rate from 563 stakeholders, with overall satisfaction rates above 80 percent across all categories. Key findings included 97 percent satisfaction with the Minimum Educational Training (MET) program and 100 percent satisfaction with the Pension Online Reporting Tool (PORT).

The feedback included possible PRB online course updates and PORT usability improvements. Ms. Miller also provided an update on conference attendance after MET rule changes and updates to PRB educational services and provided an overview of additional services or MET offerings requested and noted that staff would use the information to help inform possible

improvements to the program.

6. Minimum Educational Training program rule implementation updates (10:54)

Research Specialist Jasmin Loomis provided updates on MET rule implementation. New rules took effect in January 2025, including changes to reporting due dates from September 1 to April 1. Ms. Loomis noted there was some initial confusion and did cause some reporting compliance issues, but compliance has improved since then through ongoing technical assistance.

Ms. Loomis provided information about training and assistance provided on rule changes. She noted the MET program celebrated its 10th anniversary this year, with several training provider renewals underway under the updated rules. She stated staff will continue to help with the changes as requested.

7. Future meetings: agenda items, dates, locations, and related matters (17:27)

Chair Dush announced that the next Education Committee meeting date is yet to be determined. The next Pension Review Board meeting will take place on September 25, 2025, at 10:00 AM with location to be determined.

8. Adjournment (17:43)

The meeting was adjourned at 2:22 pm.

PRB staff in attendance:

Amy Cardona	David Fee	Bryan Burnham
Ashley Rendon	Robert Munter	Mariah Miller
Austin Pace	Jasmin Loomis	

Marcia Dush, Chair

Item 6. Overview of potential changes to the Minimum Educational Training program to improve compliance

Jasmin Loomis



Background

- Board directed staff to research possible statutory recommendations and agency actions to improve MET compliance at December 2025 meeting.
- Staff brainstormed potential ideas for statutory and nonstatutory changes.
- Presented initial ideas to stakeholders during a virtual feedback session on April 9, 2026.



April Stakeholder Feedback Session

- April 9, 2026, staff met with 19 stakeholders from 14 retirement systems.
 - Mix of statewide, municipal, TLFFRA, and Chapter 810 systems.
- Presented initial ideas for potential changes to statute and internal processes to help improve MET compliance.
- Featured a live demonstration of upcoming updates to the portal.
- Provided an opportunity for stakeholders to comment on staff's initial ideas and to share their own suggestions.



Ideas for Potential Statutory Changes

- **Authorize systems to create an education or noncompliance policy, and the creation of guidance documents or sample policies.**
 - Idea initially proposed during the TLFFRA Governance Project.
 - At least one system already has such policy.
 - Not a requirement but allow systems to expand on the existing MET requirements.
- **Stakeholder Feedback:**
 - Overall positive reactions.
 - One stakeholder voiced caution for ensuring statute is not too restrictive for noncompliant trustees.
 - One stakeholder stated that guidance materials would help get discussions started with board members.



Ideas for Potential Statutory Changes, cont.

- **Suspend trustees' ability to vote if not compliant with MET requirements.**
 - If not compliant with one or more MET cycles until they reach compliance.
- **Stakeholder feedback:**
 - Most stakeholders did not support this idea.
 - Two stakeholders were concerned about the impact to a trustee's ability to perform their duties.
 - One stakeholder was concerned it could impact smaller systems' ability to fill board seats.



Ideas for Potential Statutory Changes, cont.

- **Require trustees to complete their core training before they can serve on the board.**
 - Similar to how state agency board appointees must complete some training prior to beginning their duties on the board.
- **Stakeholder feedback:**
 - Did not receive much feedback.
 - One stakeholder was concerned over potential timing issues for new appointments.



Ideas for Potential Nonstatutory Changes

- **Provide more information and promote the individual course approval application (ICAA).**
 - Provide more ICAA information on its website and directly to system administrators.
 - Publish a list of recently approved ICAAs on the website for systems to see which courses can be approved for credit.
- **Stakeholder feedback:**
 - Overall positive reactions.
 - One stakeholder stated it would be appreciated.



Ideas for Potential Nonstatutory Changes, cont.

- **Publish list of noncompliant trustees and administrators on the PRB website.**
 - Publish noncompliant list after annual compliance report is presented to the board.
 - The list would be updated as trustees and administrators reach compliance.
- **Stakeholder feedback:**
 - Mixed reactions.
 - Three stakeholders were not opposed to the idea but had suggestions to notify systems of their trustees' noncompliance prior to publication.



Project Timeline

2026

- February – Discuss project goals with the board
- April – Meet with stakeholders to present and hear potential improvements
- **May – Present draft recommendations to Education Committee**
- June – Draft recommendations sent for stakeholder feedback
- July – Present potential statutory recommendations and nonstatutory changes to full board for feedback
- August – Updated recommendations sent for stakeholder feedback
- September – Present final statutory recommendations and nonstatutory changes, possible board adoption of recommendations
- November – Include any recommendations in PRB Biennial Report



Feedback on Potential Changes to the MET Program to Improve Compliance

Background

The Pension Review Board (PRB) monitors public retirement system trustee and administrator compliance with the Minimum Educational Training (MET) program and annually reports compliance to the board. Compliance with the MET program has increased over the past three reports, but some trustees and administrators remain noncompliant with the requirements. Following presentation of the annual MET compliance report at the December 2025 board meeting, the board directed PRB staff to research and present potential changes that could be made to improve compliance with the education requirements.

PRB staff's initial proposed changes are separated into two categories; potential **statutory changes** that would require changes to state law, and potential **nonstatutory changes** that the PRB could implement without legislation. The PRB hosted a virtual stakeholder feedback session on April 9, 2026, to get reactions and opinions on the initial potential changes. Below is a summary of feedback received on initial statutory and nonstatutory proposals.

Potential Statutory Changes

Proposed Changes	Additional Information	Stakeholder Feedback
Authorize systems to create an education or noncompliance policy, and the creation of guidance documents or sample policies.	<ul style="list-style-type: none">• Potential statutory change could authorize, but not require, systems to create an education or noncompliance policy that could expand on the existing MET requirements.• Initially proposed during the TLFFRA Governance Project.• At least one system already has an education policy.• The PRB would make guidance and sample policies available for systems that would like to adopt such a policy.	<ul style="list-style-type: none">• Most stakeholders had positive reactions to this idea.• One stakeholder voiced concern that creating statutory restrictions for noncompliant trustees may have unreasonable negative impact on trustees.• One stakeholder stated it would be a good starting point and help get the discussion started with board members.

<p>Suspend trustees' ability to vote if not compliant with the MET program.</p>	<ul style="list-style-type: none"> • Potential statutory change could suspend the voting ability of trustees that are not compliant with one or more MET cycles until they reach compliance. 	<ul style="list-style-type: none"> • Most stakeholders did not support this idea. • Two stakeholders voiced concerns about how disenfranchising trustees could impact their abilities to perform their duties. • One stakeholder stated that this proposal could impact smaller systems' abilities to fill board seats or reach quorum.
<p>Require trustees to complete core training before they can serve on the board.</p>	<ul style="list-style-type: none"> • Potential statutory change could require that new trustees complete the core training requirement before they can begin serving on a retirement system board. 	<ul style="list-style-type: none"> • Stakeholders provided little feedback on this idea. • One stakeholder voiced concern for the potential timing issues regarding new member appointments and a potentially short turnaround time to their first meeting when the trustee would need to start fulfilling their duties.

Potential Nonstatutory Changes

Proposed Changes	Additional Information	Stakeholder Feedback
<p>Provide more information and promote the individual course approval application (ICAA)</p>	<ul style="list-style-type: none"> • The PRB could provide more information on the ICAA on its website and directly to system administrators. • The PRB could also publish a list of recently approved ICAs on the PRB website so systems could easily see which courses can be approved for MET credit. 	<ul style="list-style-type: none"> • Most stakeholders had positive reactions to this idea. • One stakeholder stated it would be an appreciated change.
<p>Publish list of noncompliant trustees and administrators on the PRB website</p>	<ul style="list-style-type: none"> • The PRB could publish a list of noncompliant trustees and administrators annually on its website after the annual compliance report is given to the board. • The compliance list would be updated as trustees and administrators reach compliance, similar to how the agency handles compliance issues with reporting requirements. 	<ul style="list-style-type: none"> • Stakeholders had mixed opinions on this idea. • Three stakeholders would support this idea but requested that systems receive advance notice of noncompliant trustees prior to publication and offer a period for correction.