

OFFICE OF LEGISLATIVE RESEARCH  
PUBLIC ACT SUMMARY



**PA 25-120—SB 1525**

*Appropriations Committee*

**AN ACT CONCERNING THE TEACHERS' RETIREMENT BOARD'S  
RECOMMENDATIONS FOR CHANGES TO THE TEACHERS'  
RETIREMENT SYSTEM STATUTES**

**SUMMARY:** This act makes numerous changes to the statutes governing the Teachers' Retirement System (TRS).

The act does the following:

1. excludes State Education Resource Center (SERC) employees hired after a certain date from TRS membership;
2. specifies that a member's retirement application becomes irrevocable on the member's retirement date;
3. specifies that the Teachers' Retirement Board's (TRB) medical committee must only review disability retirement applications that meet the existing criteria;
4. establishes a succession order for returning accumulated contributions and credited interest when a member dies without a designated beneficiary for the death benefit and there is no surviving spouse;
5. limits the use of health subsidies under a union contract to only reducing the member's or spouse's costs;
6. realigns the timing of the election of certain seats on the TRB; and
7. eliminates the option for participation in the TRS by the executive director of the Commission for Education Technology.

**EFFECTIVE DATE:** July 1, 2025, except the provisions on the definition of employer are upon passage.

**§§ 1 & 2 — DEFINITION OF EMPLOYER**

The act narrows the definition of “employer” and “public school” by sunseting participation in TRS for any new members employed by SERC who are hired on or after July 1, 2025. Those who are already employed at SERC before that date and TRS members can continue membership.

**§§ 3 & 7 — RETIREMENT APPLICATIONS**

*Applications Irrevocable as of the Date the Member Retires (§ 3)*

The act specifies that retirement applications are irrevocable as of the date the member retires. Unchanged by the act, any application that is mailed in is deemed to have been filed with TRS on the date it is postmarked.

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### *Disability Retirement Applications (§ 7)*

By law, the TRB's medical committee reviews disability applications and makes findings and recommendations in writing to the board.

The act specifies that the committee must only review applications that meet the existing disability retirement application criteria. Existing law, unchanged by the act, requires that applications include various information including (1) a physician's statement of the member's health, including medical reports and the physician's office notes; (2) the employer's statement on work performance, attendance records, and any other information about the member's disability; and (3) the member's statement outlining the effect his or her impairment has on the ability to perform the duties of their job.

### §§ 4 & 6 — BENEFITS

#### *Default Death Benefit Beneficiaries (§ 4)*

By law, instead of the basic survivor's benefit and a lump sum death benefit, a member's designated beneficiary may elect to receive the member's accumulated contributions and credited interest.

The act creates default beneficiaries for the return of accumulated member contributions and credited interest when there is no designated beneficiary. Under the act, in such a case, the return goes in succession to the (1) surviving spouse or, if none; (2) surviving children in equal shares or, if none; (3) member's estate.

#### *Health Care Subsidy and Union Contracts (§ 6)*

Under the act, any health care subsidy from a collective bargaining agreement (i.e. union contract) must only be used to reduce the costs to the member or spouse, surviving spouse, or disabled member. By law, unchanged by the act, the TRS law cannot impair any union contract relating to local board of education payments for health care premiums on behalf of a member receiving TRS benefits.

### § 5 — TRB ELECTION CYCLE

The act realigns the timing of the board-member elections for two retiree seats from October to July and continuing every four years after that. This matches the timing of the other retired members as well as the current TRB members (active teachers) who hold board seats. (PA 23-63 added two board seats for retired members of the TRS in an October 1, 2023, election.)

### § 8 — COMMISSION FOR EDUCATION TECHNOLOGY TRS PARTICIPATION

Prior law allowed the Commission for Education Technology's executive director to choose participation in the TRS for himself and any commission

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employee. The act eliminates this option. The law, unchanged by the act, still allows the executive director to elect participation in the state employee retirement system or the alternate retirement system for employees in higher education.