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Loudoun County Public Schools, Special Committee of the Board on Retiree Health Benefits, Wednesday, September 10, 2025

Date Wednesday, September 10, 2025
Place LCPS Administration Building / School Board Room, Ashburn, Virginia
Length 57m (video)

- Official meeting video (Vimeo / LCPS-TV): <https://player.vimeo.com/video/1117798784?rel=0>

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Speech-to-text: whisper.cpp, model large-v3-turbo. Produced 2026-10-13. Each paragraph starts with its time [HH:MM:SS] in the meeting video.

[00:00:00] - Well, good morning. I call to order this September 10th, 2025, Select Committee on Retiree Health Benefits. This committee is audio recorded and should be available in board box, board docs. Thank you to everyone who's here.

[00:00:16] To ensure we're all on the same page, the special committee will receive information regarding LCPS's retiree health benefits, including key historical background, the evolution of related policies, and an overview of current practices. Committee members are encouraged to ask questions and engage in discussion focused on past and present aspects of the program.

[00:00:38] Please note discussions related to the future of retiree health benefits, such as proposed plan changes, premium structures, or other potential modifications, are outside the scope of this committee. As such, discussions related to future benefits would need to be addressed through the collective bargaining process.

[00:00:54] If such discussion arises, I will redirect the conversation to remain within the intended focus on historical and current information so um at this point I will we're moving on to item two public comment do we have any public comment oh we have no public comment okay then we will move on to

item three which is the minutes I will entertain a motion to adopt the draft minutes of the September 4th 2025 special was it September 4th yes committee on retiree health benefits

[00:01:32] do i have motion yes um mr chandler i move that we adopt the minutes from the most recent meeting of the retiree health benefits special committee i have a motion to adopt the minutes do i have a second second i have a second by mr chernoff um it's been properly moved and seconded um is there any discussion seeing none um all those in favor say aye aye aye and that passes unanimously okay

[00:02:06] we will move on to item 4.01 retiree health benefit open questions and i will go ahead and send that to uh miss willoughby to present miss willoughby thank you at the last meeting we had our expert panel that joined us and took questions and engaged in dialogue with the committee members and at that time there was a request regarding documenting you know some of the questions after the meeting we realized the the number of questions and the

[00:02:44] way the conversation evolved and because so many of the answers was coming from the panel members that didn't feel it would be necessarily appropriate to try to ask them to write out answers which is more of a staff process so what we did though was we did receive a packet of questions from mr Palazzi and miss powers and those are attached in board doc where we did provide written responses to those questions that we did receive in writing and as for any of the other questions from not only the last meeting but the the earlier two meetings as well I would really

[00:03:20] encourage anyone that's interested to review the audio recording so that you can really hear the discussion and the nuance of the answers provided that's all I have on that one do you guys have any questions do you want to take a minute to check things out and i'm sorry i wish mr well you can see i want to say mr palancy is not here today and my understanding is neither is mr stewart he's not here today okay madam chair yes ma'am the only thing i have i have not had an opportunity to read through all this i look yesterday and i

[00:04:00] did not find the board docs at that time when i was looking um but we'll go back to the fact that This policy, 7628, even though I briefly read today that supposedly it saved 55 million for 201 employees, seems like a lot.

[00:04:24] So without seeing how that was estimated, we still go back to the fact that is unfair for employees who were employed and had to leave for various reasons that their years of service is not counted towards retirement if they were hired prior to 2013 so I just think they're going to put 55 million I'd like to see a breakdown how they're figuring that out and I would hope in the future that the school board

[00:04:59] would ask for those figures because I know that Mr. Hornberger did ask for those figures in 2015 and it was very low so you know I just begged the new school board to please be aware of this thank you so Miss Willoughby would she or or Miss Boland would you go over that history because I know we discussed that to 2013 and that

[00:05:36] there was a presentation or something that showed that what they meant by that 2013 date of employment so the response was drafted so back in November of 2021 there was a presentation at the time and this is when benefits was in business and financial services and there was a discussion with the Finance and Operations Committee at that time regarding the policy because the practice then is the practice now and as it continues to be that the the most

[00:06:15] recent hire date is the date that determines your eligibility the discussion during that November committee meeting was a similar discussion that that we're here you know here having now regarding if there were to have been a change what that impact would be the 55 million dollar figure actually came from the committee member mr. Morse he did he was a numbers person and I don't have all the information in front of me without trying to go deep in the weeds, but if you look at what the net liability is related to the OPEB and you divided

[00:06:50] that by the 200 people, that's how it was roughly estimated of a \$55 million cost. It would also logically make sense that it is more costly in 2021 than when it was discussed in 2015 because, one, costs have escalated and also the population changes and we had better information.

[00:07:10] So the \$55 million was absolutely a very rough estimate. There's no solid calculation, but it was to highlight during that meeting that there is a financial impact related to making any change to the policy that was being discussed at that time.

[00:07:27] And so during that meeting, the committee discussed, you know, they discussed that but also highlighted the challenge that continues today of balancing the financial responsibility with ensuring having this benefit available in the future.

[00:07:43] One of the questions that you and Mr. Polanzi posed that's also in the packet that I thought was a helpful question was basically wanting to know, and I'm trying to find where it's at, how long we have to pay for this. And, of course, number five, thank you.

[00:08:04] And so we used the example of if our youngest eligible retiree could be an employee that was hired at age 18 in the year 2012. And assuming that they had continuous service and retired from LCPS, meeting eligibility requirements, and also assuming an average life expectancy of an age of 78, that this is a benefit that we would have to continue paying out until 2072.

[00:08:34] And so the example really highlighted how that hiring decision made more than a decade ago results in a financial obligation that lasts for 60 years. And so when we, in the past, talk about the retiree benefit and all of our benefits, we are always looking in the long term, wanting to make sure that we can maintain providing this well down the road.

[00:08:59] Because this isn't something that's going to end anytime soon. Like I said, under this scenario, it could be, well, another 50 years that we want to make sure that we can financially support this. You said Mr. Morris, he was the only one who did the projections.

[00:09:19] at that time because this seems to me that's something that should have been done by actuarials um you know i mean i am just providing a brief response i'm our team is very focused on looking forward and even the time it took to try to dig back looking at information from six years ago i don't have a thorough response and i'm not sure i'm going to be able to give you the answers you want quite frankly i'm giving you the facts and the history of what has transpired but to your

[00:09:55] point of new board being more cognizant in the future I think you could probably count on that I think you could probably count on that the new board being cognizant in the future I mean I'm not going to be there but you got you know and this is recorded too and so this is also going to be providing a history and something more documented for us to really go through for people to really look on board docs and see and listen so any other questions no my understanding is Mr.

[00:10:33] Streffy is going to have to leave at 11 so I wanted to we went through a lot of information here and history hmm so I asked if we could have you know your five lessons learned and so we could go ahead and move on to our next activity

[00:11:02] which so rather than just taking time and going around the table and each person sharing we developed a reflection activity related to the request from Mrs. Mansfield from the last meeting so in front of you you should have five note cards and I'm gonna give you five minutes to write down your top five lessons learned from our series of meetings with one note per card and then after those about five minutes maybe less we'll see how how long it takes you

[00:11:40] guys then we'll move on to breaking up into small groups and I'll actually separate us into some groups to kind of mix up how we're seating and we'll

[00:11:49] continue through but I'll set the timer for five minutes you'll see a lot of

[00:17:15] heads down and writing another minute or as Mrs. Mansfield finishes up her

[00:18:22] thoughts I'm going to break us up into I think three or four different groups but to switch up the mix a little bit I'm going to count us off and so I'll start with mrs. Mansfield as one I'll be two three one two urban mr. traffic season will be three miss Chandler one two three one so we'll have to like get up and move so one group will have four people so we'll have to kind of get up move around and get in your group and then I'll come around with a piece of

[00:19:01] paper but what I'm going to ask you to do is I'm gonna give you 10 minutes and in your group you're going to share with your group your five lessons learned and then that group is going to pick the top three most impactful and write it on a large piece of post-it paper that I'm going to provide to you so that's going to be our step two so hopefully you remembered what your number was and you can find your group madam madam chair miss will be um i do have dave's five top less lessons learned

[00:19:37] so can we include his just bring them with your with your group okay thank you so as we return to

[00:40:22] our seats each group should have their pad with their three top identified lessons learned from the group and hopefully before you separated back you designated your spokesperson to share out and And so I'm going to volunteer, Mr. Wagner, since our group was the one that got done the quickest with this exercise.

[00:40:46] We're going to go first, so I'm not calling anyone out. So, Mr. Wagner, do you mind sharing out with the group what our group identified as the top three? Yeah, where would you, do you want to hang it up or do you just want to just hold it?

[00:41:01] Actually, we could tear off the paper and stick it on the wall, thank you. Yes, I skipped that part. Our audience can see what has been documented.

[00:41:56] All right. For our group, our top three, first one is communication with retirees. We talk a lot about that and the need for earlier communication that everybody is in different ways to do that. I think the robocalls are going to be an incredible enhancement to that and keeping more people and more retirees engaged in the whole process.

[00:42:19] and not be -- not lead to surprises toward the end of the budget cycle. Also the history and challenges related to the OPEB. We all know that there's -- it was great to hear about the history of it, and

we all know that there's challenges moving forward with that, and some probably difficult decisions moving forward about how that's going to be funded in that.

[00:42:44] And then providing more information or data for benefit-related budget items. So the need for additional information about budgetary items that related to the benefits, especially retiree benefits. So those were our top three. Mr. Streffy?

[00:43:07] Okay. So I think one of the common threads is going to be, like our first one, early stakeholder communication and consistent engagement. I think, you know, some of the discussion around that related to kind of late-stage recommendations, Groups feeling like they were not engaged as stakeholders in the process.

[00:43:26] So even a lack of understanding around the alternatives or the options that were considered and what went into all of those. And so early stakeholder engagement and consistent engagement of all the stakeholders is important. The second one that we landed on was clarity with the self-insurance fund and how OPEB works.

[00:43:47] I think that there were real gaps in, you know, I think there was a lot of complexity around the history and all of the facts and that led to some misunderstandings as well and just this being able to have some more clarity around how everything works and what that history was. You know folks referenced that even after some of the presentations they still felt like they had so many questions or maybe even more confused afterwards. So and then the third one is balancing fiscal responsibility with our workforce commitments. So with the caveat that

[00:44:22] there will always, you know, be room or changes might be needed. One of the most important levers and success metrics that we have is our ability to ensure that we have employee trust. And so how do we then begin to, like, balance those workforce commitments or be able to keep the promises that were made?

[00:44:45] Because, you know, again, that is one of the most important success metrics and the levers that we have as a school division. those are the three that we had all right Mr. not thank you Mr. Struthi it seems that we're kind of all on the same page so obviously comms we talked a lot of also about front-loading information and and finding new avenues for the school board to also understand things that are being considered in terms of maybe that needs to be discussed more in committees before it gets to full board

[00:45:20] so kind of looking at some processes there having multiple avenues for that for the school board and for retirees and then also Ms. Chandler brought up a great point about having new thought partners which I think is something you kind of touched on Mr. Estreffy which is what happened here we had some new thought partners we had some new perspectives so really thinking outside of our normal routines for those kinds of communications and trying to project out what that could be the second was a more nuanced conversation around the relationship with the Board of Supervisors and how that relates to our

[00:45:54] fund balance we also talked about OPEB and how that was kind of surprising and so we want that relationship to be trusting and for them to have an understanding of our needs as well and to have an open relationship which we're lucky to have and so really maximizing that potential is important to the school board we have three school board members on our group so sorry Kim but also she brought up a

great point too about it's not just understanding historical context which is a part of it it's also understanding the current cost and then it's this really ambiguous idea about what the future is and how

[00:46:31] that's unknown and so that sort of tethers us to these decisions in a way that makes it really difficult and so kind of focusing on those three areas the last one was balance between what LCPS has control of in terms of baseline decision-making and then supporting individualized needs understanding that health care is nuanced it is needs to be differentiated and that LCPS really cannot is not built to sustain finding out what every single pathway for every single retiree is going to look like but we do have a responsibility to connect you all with those resources and ensure that we have support where needed to

[00:47:09] figure out what those individualized questions needs concerns are so that you You can make decisions about your life that are founded in facts and truth. So those were our three. Thank you. So now that we have our three from all of the small groups, I think now is the time for a little bit of reflection on what patterns are seen.

[00:47:42] Clearly, communication is one of them. And are there any surprises, identified themes, and how are we going to move forward from this? So I can open it up to, if you want to think for a little bit, and then raise your hand.

[00:48:01] I mean, I do think one thing that is very important that I see is that relationship with the Board of Supervisors. Because that's where a lot of things come from.

[00:48:17] And to do better with that history of the OPEB, have conversations about not sweeping things, which I don't think would happen again. I think things are, lessons are learned.

[00:48:32] okay anybody else mr. Stryffy so just a quick reflection for me I was just want to add something about transparency I think we the word came up a few times throughout you know throughout all of our discussions and I've been thinking about it and as you know it's during my tenure as a school board member that word has come up so many times and then I think also about how we build trust or how we earn trust. And as time passes more and more, I think that trust is not about, you know,

[00:49:11] getting every single thing that we or myself as an individual advocate for, but it's grounded in the process that we have to earn trust. And so even through compromise, even through discussions, I think we can still maintain and build trust, even if there are changes. So I think that's just one reflection um and transparency really isn't as much about this you know this uh uh implied meaning around hiding things it's just it's part of that process right and so um and and you know we can use it to build trust so just just a you know a quick reflection around transparency and

[00:49:50] building trust thank you chair mansfield i just want to thank everyone who has been involved and gotten to us to this point this whole thing has been a lesson learned for me as a school board member from 100 people showing up at the library for a town hall which shocked me to you know just how much information I needed to learn and understand and to me it all is encapsulated with what's happening here we have literally come to the table together and that's my big takeaway

[00:50:27] is that that's what this needs to be it needs to be communicated in such a way that people feel that they can have a voice at the table that they can be heard that also there can be a volley of well this is the reality and this is the understanding and this is what we're up against and then a commitment I think to next steps to move forward to do better as we go along and I think that that I hope my hope is that you

all will feel that this process has at least helped move us in a direction to have more trust and to have more open dialogue in the future as decisions

[00:51:02] are made and so that would be my big takeaway and I'm just very very grateful to have been included and for all that you all have shared and LCPS too for you know really coming to the table to offer those tough decisions that have to be made but also being willing to help move this in a better direction in the future so thank you madam chair I do have a letter from

[00:51:36] Dave and I wish he'd be here today but let me go ahead and read this Dave and I would like to thank miss Mansfield for suggesting and facilitating the special committee on retiree health benefits and the school board members who actively participate in the meetings thank you to LCPS admin members for input organization and participation in this committee we are pleased to have been selected for the committee and included in the discussion process on retiree health care acting on behalf of retirees that has allowed us to share the

[00:52:15] retirees point of view with meaningful conversations since this last meeting of the committee we would like to share some final thoughts for future planning number one LCPS retirees have been diligent responsible and committed employees. Unlike private businesses, they do not get perks and bonuses to offset their finances.

[00:52:39] Instead, they dedicate their lives to children and their future knowing they will get a non-competitive salary and benefits. Teaching is not a job, it's a career. And with the career, it is accompanied by long-time financial security. Number two, retiree health benefits for those hired after July 1, 2013 have already been taken away due to the dwindling teacher shortage salaries and good benefits should be used to attract students to become educators not discourage them for a career in education

[00:53:16] three the school board and lcps admin should always make it a priority to engage in proper budget planning to make lcps the quote school system of choice end quote for educators and staff seeking positions for as a site-based finance assistant for a school I know about accountability being audited by professionals each year state and local finance rules and the responsibility of balancing funds this entails budgeting even when times are tough and there are unexpected expenses

[00:53:56] as mentioned before revenues to fund the obligation to employees simply must be met with financial planning from experts who can guarantee continuity in the future, even when the markets and claims change. Retirees are not opposed to change, but when they do occur, they need to include choices. Know that the school system's finances are viable for the future and their welfare is considered. In closing, we cannot emphasize enough that we appreciate the school

[00:54:30] Board listening to retiree concerns. Going forward, when LCPS admin proposes changes to benefits, please request a comprehensive study of numbers and facts and analyze them thoroughly before voting on a decision that affects the stability of LCPS retirees. Thank you. Thank you, Ms. Powers. Well, I do appreciate you all considering, you know, being a part of this and I appreciate staff taking their time because it was a lot of time

[00:55:10] on their part as well and moving forward think we will do better you know so I is there are there any other things that you guys would like to put out there before I adjourn the meeting I know it's early but no yes mr. Wagner sorry thank you miss missville and I want to echo the thank you to all the school were members who participated in this and made this committee possible I think

[00:55:48] there's a great deal of information thank you to staff for all the information you provided and a better understanding of everything the one thing that I'd like to add is that I think I feel with the retirees and I brought this up in our small group here but I think it needs to be out further when it comes to plan one retirees moving forward every year plan one active employees is going to diminish an LEA in the collective bargaining is bargaining for all health benefits for active employees but there will be less

[00:56:25] and less of a I guess for lack of a better term ability for LEA to advocate for those plan one retirees when they're only a small percentage or in less and less percentage so it doesn't feel right that the plan one retirees don't have a seat at the table or at least be part of the conversation and if there's any way that you know moving forward we can think about ways that that could be possible or at least have some way to be better engaged so moving forward I

[00:57:00] think that's something that would be extremely important thank you mr. Wagner okay with that I think I will go ahead and any other new business don't think so again thank you and our what is it the Wednesday September 10th 2025 special committee on retiree health benefits is adjourned and the select

[00:57:35] committee I think is going to be concluded thank you so much



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