

Teacher Retirement System of Texas
 Retirees Advisory Committee for TRS-Care
 Thursday, April 2, 2026 | Meeting Minutes

The Teacher Retirement System of Texas (TRS) Retirees Advisory Committee (RAC) for TRS-Care met at 1:00 p.m. on Thursday, April 2, 2026. TRS hosted the meeting at 4655 Mueller Blvd., 2nd Floor, Boardroom, Austin, Texas. This meeting had a virtual option for the court reporter.

RAC Members	TRS Staff	Other Attendees
Present: Dr. Mary Widmier, Vice Chair Sherry Miller Anita Kay Young Wolfe Pete Pape Tonya Davis Absent: Nancy Byler, Chair Mary Ann Whiteker	Presenters: Caasi Lamb Chris Herrick Monica Bernal Jon Sanchez Cristina Juarez Umme Salama Oan Ali Attendees: Meaghan Bludau Yimei Zhao Cindy Wright Rob Humphrey Jean Babin-Gibson Denise Jimenez Leo Flores Lori LaBrie Elizabeth Hallmark David Munns Rob Maxwell Karen Early Summer Frizzell	Damian Esquibel, UnitedHealthcare Tam McCall, UnitedHealthcare Karen Haywood, Blue Cross Blue Shield of Texas Laura Wolf, Blue Cross Blue Shield of Texas Erma Gibbons, MetLife Elizabeth Stoddard, On The Record Dr. Robert Wolfe

1. Call to Order

The meeting was called to order by Vice Chair, Dr. Mary Widmier, at 1:05 p.m.

2. Roll Call of Retirees Advisory Committee Members

Majority of RAC members were present. RAC Chair, Nancy Byler, and Mary Ann Whiteker were absent.

3. Approval of Meeting Minutes from October 13, 2025 RAC Meeting

The minutes from the October 13, 2025 meeting were reviewed and approved unanimously.

4. Public Comment

No public comments were received during the designated time.

Before the Executive Update, Chris Herrick introduced Cindy Wright as the Director of Health Engagement and Operational Excellence. He also thanked the RAC for their service and shared the Board's decision to extend terms for the four members whose terms were ending on Jan. 31, 2026.

5. Executive Update

TRS Deputy Director Caasi Lamb provided an update on the legislatively required pension plan design study. Unlike prior studies, the current effort incorporates workforce and demographic trends in addition to reviewing alternative plan structures. Preliminary findings indicate that approximately 77 percent of active TRS members do not participate in Social Security and that teacher retention increases significantly after vesting. Additional work will include benchmarking against other states, review of the pension funding equation, and potential plan design options for consideration during the 2027 legislative session. Ms. Lamb also shared updates on TRS regional offices, including plans to relocate and expand the El Paso Regional Office and to open a new South Texas regional office in Mission, TX to improve in-person access for members approaching retirement. She concluded by noting TRS's recognition as a Top Workplace and by acknowledging Health Division staff recipients of Golden Apple Awards.

6. Spotlight on NICE Initiative

Jon Sanchez, Director of Health Member Services, was invited as a guest speaker to present an overview of the NICE Initiative, a technology enhancement focused on improving member experience within TRS Health customer service operations. Planned enhancements include a smart interactive voice response system (Autopilot), real-time

counselor support tools (NICE Copilot), and analytics capabilities (Enlighten XO). These tools are designed to improve call routing, reduce wait times, support staff during complex calls, and provide actionable insights into member needs. Initial launches are scheduled for 2026, with future reporting to RAC anticipated after implementation.

7. Health Care Update

Chris Herrick, Deputy Chief of Health Operations, shared highlights from the TRS Health Annual Report. He reported that TRS health plans continue to deliver strong value, with more than 97 percent of each premium dollar dedicated to medical and prescription benefits. Premiums for Medicare Advantage were reduced in 2025, and a limited-time enrollment period concluded in March 2026, allowing former participants to re-enroll; more than 2,000 retirees took advantage of this opportunity. Premiums for TRS-Care Standard, dental, and vision remained unchanged. Online dental and vision enrollment through MyTRS significantly improved efficiency and member experience, resulting in approximately 12,000 net enrollments. Additional Health Web Self-Service enhancements are scheduled to launch in summer 2026. The member rewards program was expanded to TRS-Care Standard, with strong early participation. For TRS-ActiveCare, 25 employers are joining or rejoining the program for the upcoming plan year, reflecting continued employer confidence in the plan. Mr. Herrick also confirmed the Board's recent procurement decisions to continue partnerships with Blue Cross Blue Shield of Texas for TRS-ActiveCare and TRS-Care Standard and UnitedHealthcare for TRS-Care Medicare Advantage.

a) TRS-Care Operations Update

Monica Bernal, Sr. Director of Health Operations, reported on operational improvements to enhance efficiency and member satisfaction. Online dental and vision enrollment through MyTRS significantly reduced processing time and staff workload while improving service levels. Additional Health Web Self-Service features will launch in summer 2026, allowing members to enroll, update information, and access documents online.

b) TRS-Care Engagement Update

Cristina Juarez, Health Engagement Manager, highlighted extensive outreach efforts supporting enrollment and benefit awareness, totaling millions of participant touchpoints through mail, email, digital, and in-person communications. Optimizing communications toward more digital delivery has generated substantial cost savings while maintaining strong engagement. Statewide retiree health fairs are planned for 2026 to further support member education.

8. Feedback on digital communications & *The Pulse* topics

The committee also reviewed feedback on The Pulse newsletter.

9. RAC Roundtable

During the RAC Roundtable, committee members expressed appreciation for continued improvements in communications and customer service. Members also highlighted the importance of promoting lesser-known benefits, particularly those supporting retirees who wish to age in place. Staff acknowledged this feedback and discussed opportunities to enhance education for retirees and their caregivers.

10. Date of Next Meeting(s)

The next RAC meeting is scheduled for Monday, October 19, 2026, with a backup date of Monday, October 26, 2026, at the TRS Bravo Building.

11. Adjourn

The meeting was adjourned at 2:37 p.m.