



**Sonoma County Junior College District
Classified /Confidential/Classified Managers
Early Retirement Option Application**

This application constitutes my request to retire early and receive the benefits of the incentive program. I understand that if this request is approved by the Board of Trustees I will conclude my employment with the Sonoma County Junior College District. I understand that the health benefits offered through this program will become secondary should future employment provide an alternative health care program. My signature below and my initials appearing at the end of each page certify that I have read and understand the Early Retirement Options Article of the SEIU bargaining agreement.

_____ **Print Full Name** _____ **Signature**

_____ **Birth Date and Year** _____ **Date of Hire at Santa Rosa Junior College**

Effective Date of Early Retirement: _____

Any breaks in the continuity of service?

_____ No

_____ Yes _____ Year

Conditions:

For Office Use Only:

Data Verification: _____ By: _____

Date Application Approved by Board of Trustees: _____

Applicant's Initials: _____

Early Retirement Option

9.4 EARLY RETIREMENT OPTION

9.4.1 When this bargaining agreement is reprinted, this section will become a new and separate Article title Retirement.

9.4.2 The Early Retirement Option (ERO) shall be available to any classified/confidential/classified manager member who meets the minimum qualifications for eligibility.

A. Incentive Plan

1. The individual who chooses the Early Retirement provisions will be granted the same medical/dental benefit package that is received by currently employed full-time classified/confidential/classified manager employees employed by the District. These District-paid benefits will cease on the first day of the month in which the retiree reaches age sixty-five (65).
2. Alternate early retirement provisions for medical/dental coverage:
 - a. Monthly payment option. Upon request, early retirees who move out of the District's medical service area will be granted a monthly payment equal to the amount of the premium that would otherwise be paid to the medical coverage provider for said individual upon proof that the retiree is securing medical and dental benefits elsewhere.
 - b. No guarantee of re-instatement. There is no guarantee that a retired classified member/confidential/classified manager who elects this monthly payment option will be eligible for reinstatement into the health plan at a later date, if the retiree is securing medical and dental benefits elsewhere.
3. On the first day of the month in which the retiree reaches age sixty-five (65), the incentive benefits will be converted to the same medical/dental stipend regular retirees of equal or superior age receive at that time.
4. It is the responsibility of each potential early retiree to carefully evaluate his/her personal economic situation with respect to all applicable retirement systems and other retirement income prior to applying for early retirement. Once the signed application and agreement form(s) are approved by the President and the Board of Trustees, the decision to resign and retire may not be rescinded. Candidates for Early Retirement option are encouraged to consult a PERS advisor and pursue all other advisory sources that will clarify their personal financial situation upon retirement.
5. All early retirements commence at the beginning of the month following the last day of service.

Applicant's Initials: _____

B. **Eligibility**

1. The regular classified employee/confidential/classified manager must have completed a minimum of fifteen years of full-time employment with the District, five of which must have been as a regular classified member/confidential/classified manager. Unpaid leaves of absence will not be considered in the computation of years of service. Probationary or regular service at less than 100% will be computed and accumulated on a pro rata basis.
2. The applicant must have attained a minimum age of fifty-five (55) years or a maximum age of sixty-four (64) years the final year of service.
3. The applicant must satisfactorily complete and submit the necessary Early Retirement Application and Agreement Form(s) at least 120 calendar days prior to the effective date of retirement.
4. If the early retiree subsequently becomes employed after retiring from the District, the benefits provided by the Sonoma County Junior College District under the Early Retirement provisions become secondary to those provided by the new employer.
5. Should the early retiree terminate his/her medical/dental benefits package with the Sonoma County Junior College District, the District cannot guarantee that the early retiree will be reinstated by the insurance carrier under group coverage currently provided to currently employed classified staff.

C. **Procedures**

1. Early Retirement Application and Agreement Form(s) may be obtained from the Human Resources Department.
2. To be considered for Early Retirement under the provisions of the incentive program, the application form(s) must be completed and submitted to the Human Resources Department at least 120 calendar days prior to the effective date of retirement.
3. All applications will be reviewed by the President and the Human Resources Director. The applications of those candidates who qualify for the program will then be forwarded, in a timely fashion, to the Board for appropriate action at the next regular Board meeting. Any questions that arise regarding the eligibility of an individual will be reviewed with the applicant.
4. If extenuating circumstances arise, exceptions to the applications deadline will require approval by the President and by the Board of Trustees.

Applicant's Initials: _____