



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:

Horizontal lines for conditions

\*\*\*\*\* separator line \*\*\*\*\*

For Office Use Only:

Data Verification: By:

Date Application Approved by Board of Trustees:

## 16.7 EARLY RETIREMENT OPTION

The Early Retirement Option (ERO) shall be available to any classified 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 at that time by the District. These benefits will cease on the first day of the month in which the retiree reaches age of Medicare eligibility. If the Early Retiree dies before age 65, the spouse/domestic partner and /or eligible dependents coverage under the Early Retiree Option will cease the first day of the month in which the retiree would have reached the age of 65. At such time, the eligible survivor will receive the single retiree stipend amount.
2. Alternate early retirement provisions for medical/dental coverage:
  - a. Monthly payment option. Upon request, early retirees who reside 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 reinstatement. 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 should want to return to the plan.
3. On the first day of the month in which the retiree reaches age sixty-five and the eligibility for Medicare of the individual choosing the Early Retirement option, the incentive benefits will be converted to the medical/dental stipend then being received by regular retirees of equal or superior age with no other eligibility criteria applied.
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 Superintendent/President and the Board of Trustees, the decision to resign and retire may not be rescinded. Candidates for early retirement 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 date of service.

### B. Eligibility for employees hired prior to 10/1/2013

1. The regular classified staff member must have completed a minimum of fifteen (15) years of full-time employment with the District, five (5) of which must have been as a regular classified member. Calculation of years of classified service shall be based on 1720 hours worked per year. Unpaid leaves of absence will not be considered in the computation of years of service. Regular service at less than 100%, including 9 month employees, will be computed and accumulated on a pro rata basis.

Applicant's Initials: \_\_\_\_\_

2. The applicant must have attained a minimum age of fifty-five (55) years or a maximum age of sixty-four (64) on, or before their final month 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. However, if the early retiree maintains the SRJC medical/dental benefits throughout his/her early retirement status, then on the first day of the month in which the retiree reaches age sixty-five, he/she will automatically be eligible to enroll in and purchase any existing SRJC retiree group medical/dental options, subject to provider approval.

**C. Eligibility for employees hired on or after 10/1/2013**

1. The regular classified staff member must have completed a minimum of seventeen years of full-time employment with the District, five of which must have been as a regular classified member. Calculation of years of classified service shall be based on 1720 hours worked per year. Unpaid leaves of absence will not be considered in the computation of years of service. Regular service at less than 100%, including 9 month employees, will be computed and accumulated on a pro rata basis.
2. The applicant must have attained a minimum age of sixty-two (62) years or a maximum age of sixty-four (64) on, or before their final month 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. However, if the early retiree maintains the SRJC medical/dental benefits throughout his/her early retirement status, then on the first day of the month in which the retiree reaches age sixty-five, he/she will automatically be eligible to enroll in and purchase any existing SRJC retiree group medical/dental options, subject to provider approval.

**D. Procedures**

1. Early Retirement Application and Agreement Form(s) may be obtained from the Human Resources Department.

Applicant's Initials: \_\_\_\_\_

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 Vice President of Human Resources. 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 Superintendent/President and by the Board of Trustees.

Applicant's Initials: \_\_\_\_\_