



## **Acknowledgment of the Santa Rosa Junior College Early Retirement Option Intent**

I understand that the intent of the Early Retirement Option is to grant eligible applicants the same medical/dental package that is received by active full-time employees of the District.

I understand that the medical/dental package that is granted to me upon approval of my Early Retirement Option Application, is subject to change based upon future negotiations between the District and the bargaining unit with which I am currently affiliated.

I understand that should a future agreement between the District and the bargaining unit require active full-time employees of the District to participate in a cost sharing of medical/dental premiums, then the same level of participation will be required of all Early Retirees.

I acknowledge that I have read the intent of the Early Retirement Option as stated above. I understand that I may be responsible for future premium payments while I am a participant in the Santa Rosa Junior College Early Retirement Option.

\_\_\_\_\_  
Employee Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Early Retiree Effective Date



Sonoma County Junior College District
Classified
Early Retirement Option Application

This application constitutes my request to retire early and receive the benefits of the early retirement option. 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 Option Article of the SEIU bargaining agreement.

Print Full Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Birthdate: \_\_\_\_/\_\_\_\_/\_\_\_\_
Month Day Year

Date of Hire at Santa Rosa Junior College: \_\_\_\_\_

Effective Date of Early Retirement: \_\_\_\_\_

Any breaks in the continuity of service at Santa Rosa Junior College?

\_\_\_\_\_ No

\_\_\_\_\_ Yes \_\_\_\_\_ Year

Conditions:

\_\_\_\_\_
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For HR 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 unit 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 unit members employed at that time by the District. These benefits will cease on the first day of the month in which the retiree reaches the 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 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 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 65 and becomes eligible for Medicare, 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 with their appropriate retirement system 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. Unit members 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 unit member 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 unit 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 unit 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 unit member 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 unit member 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 Superintendent/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 unit member.
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: \_\_\_\_\_