



SWEETWATER UNION HIGH SCHOOL DISTRICT HUMAN RESOURCE SERVICES DIVISION

1130 Fifth Avenue
Chula Vista, CA 91911-2896

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• Francisco X. Gaona
• Benefits Manager
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PLEASE POST

2023-2024 Notification of Pre-Retirement Reduction on Workload

Per Article 28 of the SEA/CTA/NEA and Article 33 of the SCGA/CTA/NEA contract, “a unit member may reduce his/her workload prior to retirement from full-time duties and receive the same credit toward retirement he/she would have received if he/she were employed on a full-time basis.”

The Pre-Retirement Reduction in Workload program is open to current SEA and SCGA unit members who meet the following requirements:

- a) Must have attained the age of fifty-five (55) years by September 1 of the school year in which work reduction begins.
- b) Must have been employed as a FULL-TIME certificated employee for at least ten (10) years, of which the last five (5) years were in FULL-TIME employment in the District.

If you are interested in participating in this program during the 2023-2024 school year, please contact Lorena Loera at 619-585-6001 or lorena.loera@sweetwaterschools.org and/or Maricela Reyes at 619-691-5504 or maricela.reyes@sweetwaterschools.org for application details. Completed applications will need to be submitted by, or before, May 1, 2023.



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MEMORANDUM

TO:

FROM: Department of Human Resources

DATE:

SUBJECT: Pre-Retirement Reduction in Workload Program Application Packet

****NEW PARTICIPANT****

As per your request, attached for your reference is the Pre-Retirement Reduction in Workload Program packet. Please read over the information sheet provided, and return completed Pre-Retirement Reduction in Workload Program forms to Human Resources **no later** than **May 1, 2023**:

Forms to be completed & returned include:

- Pre-Retirement Reduction in Workload Program Application
- Pre-Retirement Reduction in Workload Program Agreement
- Reduced Workload Program Eligibility Certification (CALSTRS form ES 1161)

Should you have additional questions, feel free to contact Human Resources.

Pre-Retirement Reduction in Workload Program Information Sheet

In accordance with Education Code section 44922/87483 and as noted in the SEA and SCGA collective bargaining agreements, Article 28 and Article 33 respectively, "In accordance with Education Code 44992, a unit member may reduce his/her workload prior to retirement from full-time duties and receive the same credit toward retirement he/she would have received if he/she were employed on a full-time basis."

Employees who meet the following criteria may request consideration to participate in the Sweetwater Union High School District's Pre-Retirement Reduction in Workload Program:

ELIGIBILITY REQUIREMENTS

The unit member must:

1. Must have attained the age of fifty-five (55) years prior to the effective date of the school year in which participation begins.
2. Must have been employed as a full-time certificated employee for at least ten (10) years, of which the last five (5) years were in full-time employment in the District.
3. Must have five (5) consecutive, full-time years without a break in service immediately preceding the reduced workload request.
4. Submit a written request to the employer. Applications MUST be submitted to Human Resources with site approval by May 1, 2023.

PROGRAM INFORMATION

- Participation in the Program must be Board approved before the participant's normal job assignment starts for the school year.
- Participation in the program must be for at least one (1) school year. If a participant terminates or retires in the middle of the school year, he/she may lose CalSTRS Defined Benefit service credit and final compensation benefits.
- Unit members may not participate for more than five (5) years.
- It is understood that at the term of the unit member's participation in the Pre-Retirement Reduction in Workload program, he/she will begin his/her retirement.
- Pre-Retirement Reduction in Workload Agreements end on the last working day of the participant's normal job assignment.
- In the event of a proven hardship, upon written request, the District may grant an exception (e.g. death, divorce, bankruptcy, etc.).
- The employee shall receive all fringe benefits as provided in Government Code section 53201 in the same manner as a full-time employee.



Pre-Retirement Reduction in Workload Program Application

I wish to apply for participation in the Pre-Retirement Reduction in Workload Program.

Name: _____ SSN: _____ School Year: _____

Please select your participation (select one box only):

- Semester I – 100% full time; Semester II - 0%
- Half-time – 50% for the entire school year (three periods)
- Other part-time assignment as identified in Article 28 of the SEA collective bargaining agreement or Article 33 of the SCGA collective bargaining agreement

_____ % (*must be at least half-time)

Please identify the subject area(s) and grade level(s) that you would be willing to teach in conjunction with a part-time assignment.

Subject Areas: _____ Grade Levels: _____

Subject Areas: _____ Grade Levels: _____

Subject Areas: _____ Grade Levels: _____

Subject Areas: _____ Grade Levels: _____

Employee's Signature: _____ **Date:** _____ **Site:** _____

Additional Approvals:

Site Principal: _____ **Date:** _____

HR Department: _____ **Date:** _____

cc: County Retirement Office
Payroll
Personnel File

"Sweetwater Union High School District programs and activities shall be free from discrimination based on age, gender, gender identity or expression, or genetic information, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics." SUHSD Board Policy 0410



Pre-Retirement Reduction in Workload Program Agreement

Employee's Name

Social Security Number

Pursuant to Education Code Section 44922/87483, and in accordance with the **S.E.A. / S.C.G.A.** (circle applicable unit) collective bargaining agreement, I agree to perform my teaching/counseling service on a part-time basis with full retirement credit.

1. Participation in the program will begin on _____, which is the first contractual duty day and end on _____, which is the last contractual duty day of the **2023/2024** school year.
2. The required days of service will be _____ workdays with commensurate compensation not less than 50% of the salary rate for the school year.
3. Contributions to the California State Teachers' Retirement System shall be based on the full salary amount.
4. Any leave without pay that would reduce earnings below 50% will void participation in this program.
5. Retirement before the "normal" close of the contract school year will void participation for the final year. Service credit will be adjusted accordingly.

Pay Option

1. 50% -- 60% -- 80% pay for 12 months for the entire school year.
(circle applicable percentage)

Employee's Signature

District Authorized Representative's Signature

Date

Reduced Workload Program Eligibility Certification

ES 1161 (REV 01/18)

CALSTRS

California State Teachers' Retirement System
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275
800-228-5453
CalSTRS.com

Please thoroughly read the attached instructions before completing this form. Please type or print legibly in dark ink. This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which a member's workload is reduced.

SECTION 1: MEMBER INFORMATION

MEMBER NAME (LAST, FIRST, INITIAL)

CLIENT ID OR SOCIAL SECURITY NUMBER

COUNTY CODE/NAME

DISTRICT CODE/NAME

SECTION 2: REDUCED WORKLOAD PROGRAM ELIGIBILITY REQUIREMENTS

YES

NO

1. The governing board of the employer or a county superintendent of schools has established regulations that allow employees who are members of the DB program to participate in the Reduced Workload Program.

2. The member has met all of the following requirements:

- Member is 55 or older prior to the start of the school term of the first school year in which the member's workload is reduced.
- Member has at least 10 years of service credit prior to the start of the school term of the first year in which the member's workload is reduced.
- Member has been employed in a full-time position to perform creditable service under the DB program each year of the five school years immediately preceding the first year in which the member's workload is reduced, without having a break in service.
- Member is employed by a school district or county office of education as a PreK-12 certificated employee who does not hold a position with a salary greater than that of school principal *OR* is employed by a community college district (community colleges have no salary limit).

3. A written agreement exists between the employer and the member that:

- Is in effect prior to the beginning of the school term of the first year in which the member's workload is reduced.
- Requires member to work at least 50 percent of a full-time position.
- Includes member and employer contribution information.

4. Total amount of time in which member reduces his/her workload is not more than 10 school years.

Note: If the response to any of the above items is "NO," the member may not be eligible to participate in the Reduced Workload Program. Please contact CalSTRS immediately for final determination.

DATE OF AGREEMENT	SCHOOL TERM BEGIN DATE	FULL-TIME SALARY	PERCENTAGE OF FULL-TIME POSITION
		\$	%

SECTION 3: EMPLOYER CERTIFICATION AND SIGNATURE

I understand it is unlawful to make a knowingly false material statement, to knowingly fail to disclose a material fact or to otherwise provide false information with the intent to use it, or allow it to be used, to obtain, receive, continue or increase a benefit administered by CalSTRS. I hereby certify by submitting the information on this form is true and correct and that the member is eligible to participate in the Reduced Workload Program as described in Education Code sections 22713.

OFFICIAL'S NAME & TITLE

OFFICIAL'S SIGNATURE

DATE

CalSTRS USE ONLY

CalSTRS SIGNATURE

APPROVAL DATE



Reduced Workload Program Eligibility Certification - Instructions

Read these instructions before completing this form. Print or type in dark ink. Initial all corrections.

Use this *Reduced Workload Program Eligibility Certification* form to verify the member's eligibility for the Reduced Workload Program, per Education Code section 22713. This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which the member's workload is reduced.

SECTION 1—MEMBER INFORMATION

Enter member's full name, Client ID or Social Security Number, county code and name, and district code and name.

SECTION 2—REDUCED WORKLOAD PROGRAM ELIGIBILITY REQUIREMENTS

Per Education Code section 22713 specific requirements must be met for any member to participate in the Reduced Workload Program. Review each part 1 through 4, and check the corresponding "YES" or "NO" box that is applicable to the member meeting each requirement. If the response to any of the requirements is "NO," the member may not be eligible to participate in the Reduced Workload Program. Please contact CalSTRS immediately for final determination.

Date of Agreement is the date in which the agreement between the employer and member is established for the member to participate in the Reduced Workload Program. The date of the agreement must be before the school term begin date.

School Term is defined as a minimum period of 35 weeks beginning the first day and ending the last day creditable service is required to be performed by a member employed on a full-time basis.

Full-Time Salary is the annualized pay rate the member participating in the Reduced Workload Program would have earned if he or she were to be employed full-time in the position.

Percentage of Full-Time Position means the percentage of time the member will be reducing his or her full-time position to. The member must work at least 50% of the time the employer requires for full-time employment in that position.

SECTION 3—EMPLOYER CERTIFICATION AND SIGNATURE

Sign and date this form before submitting it to CalSTRS. This form will not be accepted without a signature and date.

SUBMIT

This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which the member's workload is reduced.

Mail form: CalSTRS
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275

Fax form: (916) 414 - 5476

Email form: Submit form electronically via secure messaging on the Secure Employer Website (SEW)

QUESTIONS

For information regarding the Reduced Workload Program or this form, please contact your CalSTRS Employer Services representative at EmployerHelp@CalSTRS.com

ARTICLE 28

PRE-RETIREMENT REDUCTION IN WORKLOAD

In accordance with Education Code section 44922, a unit member may reduce his/her workload prior to retirement from full-time duties and receive the same credit toward retirement he/she would have received if he/she were employed on a full-time basis. Regulations governing this provision are as follows:

- A. The employee must have attained the age of fifty-five (55) years by September 1, of the school year in which work reduction begins.
- B. The employee must have been employed as a full-time certificated employee for at least ten (10) years, of which the last five (5) years were in full-time employment in the District.
- C. Entry into the five (5) year Part-Time Employment Plan must be exercised at the request of the employee and termination of the plan thereof can be only with mutual consent of both employee and employer. (Final approval of employee participation would rest with the District). It is understood that at the termination of the unit member's participation in the Part-Time Employment Plan, the employee will begin his/her retirement. However, in the event of proven hardship, the District may grant an exception (e.g., death, divorce, bankruptcy, etc.).
- D. The option to participate in the Part-Time Employment Plan shall be through written request of the employee to the Human Resources Department. Such a request as noted above is to be submitted on a District prepared form. Applications should be submitted annually by May 1.
- E. The employee shall be paid a salary which is the pro rata share of the salary he/she would have earned had he/she not elected to exercise the option of a Part-Time Employment, but shall retain all other rights and benefits for which he/she makes the payments that would be required if he/she remained in full-time employment. The employee shall receive all fringe benefits as provided in section 53201 of the Government Code in the same manner as a full-time employee.
- F. Minimum and maximum Part-Time Employment shall be as follows: Unit members must teach at least half-time to be eligible for the program. The selected work schedule may consist of teaching either one hundred percent (100%) of one (1) semester, and zero percent (0%) of the other, or another part-time assignment as defined in Article 27, Part-time Employment; Section 27.3.

Non-classroom employees who are unit members will be required to be on duty either: one hundred percent (100%) of one (1) semester and zero percent (0%) of the other semester; or another part-time assignment for the entire year, hours as mutually agreed upon.

- G. Deductions for STRS contributions by the District and by the part-time employee shall be equal to the amount required of a full-time employee. Deductions are to be made on a monthly basis depending on the pay program selected by the employee.
- H. Each unit member participating in this plan will earn sick leave in proportion to the percent of employment per year. Example: Fifty percent (50%) (half-time) employment would yield sick leave of fifty percent (50%) of ten (10) days or five (5) days of sick leave. Such sick leave would be cumulative.
- I. The District will announce annually the availability of the Part-Time Employment Plan to all employees.
- J. All provisions of this program will be available to each employee through building principals and administrative department heads.
- K. Participating employees will be scheduled for individual meetings by the Human Resources Department to develop a mutually agreeable program for the employee on or before May 30.
- L. Where two (2) or more employees apply for the same part-time position, such position shall be filled by the employee with the greatest District-wide seniority.
- M. Employees who participate in the Part-Time Employment Plan will perform extra duties proportionate to full-time employees. (Half-time employees will perform half [1/2] as many duties as full-time employees).
- N. Upon written request by an authorized Association representative, the District shall provide the Association with a list of unit members who have been approved for Part-Time Employment for the following year.
- O. The Agreement between the District and the participating unit member shall be consummated on or before June 10. (The unit member may be accompanied by an Association representative in any meeting he/she attends with the District, pursuant to this article).
- P. Application for participation in the program shall be completely voluntary and at the discretion of the employee.

ARTICLE 33

PRE-RETIREMENT REDUCTION IN WORKLOAD

In accordance with Education Code section 44922, a unit member may reduce his/her workload prior to retirement from full-time duties and receive the same credit toward retirement he/she would have received if he/she were employed on a full-time basis. Regulations governing this provision are as follows:

- A. The employee must have attained the age of fifty-five (55) years by September 1 of the school year in which work reduction begins.
- B. The employee must have been employed as a full-time certificated employee for at least ten (10) years, of which the last five (5) years were in full-time employment in the District.
- C. Entry into the five (5) year Part-Time Employment Plan must be exercised at the request of the employee and termination of the plan thereof can be only with mutual consent of both employee and employer. (Final approval of employee participation would rest with the District.) It is understood that at the termination of the unit member's participation in the Part-Time Employment Plan, the employee will begin his/her retirement. However, in the event of proven hardship, the District may grant an exception (e.g., death, divorce, bankruptcy, etc.)
- D. The option to participate in the Part-Time Employment Plan shall be through written request of the employee to the Assistant Superintendent, Human Resources. Such a request as noted above is to be submitted on a District prepared form. Applications should be submitted by May 1.
- E. The employee shall be paid a salary which is the pro rata share of the salary he/she would have earned had he/she not elected to exercise the option of a part-time employment, but shall retain all other rights and benefits for which he/she makes the payments that would be required if he/she remained in full-time employment. The employee shall receive all fringe benefits as provided in section 53201 of the Government Code in the same manner as a full-time employee.
- F. Minimum and maximum part-time employment shall be as follows: Unit members may work either one hundred percent (100%) of one (1) semester and zero percent (0%) of the other, or one-half ($\frac{1}{2}$) day basis for the entire year. One-half ($\frac{1}{2}$) day is defined as seventeen and one-half ($17\frac{1}{2}$) hours per week. The salary shall be fifty percent (50%) of the salary if he/she were serving a full-time assignment.

- G. Deductions for STRS contributions by the District and by the part-time employee shall be equal to the amount required of a full-time employee. Deductions are to be made on a monthly basis depending on the pay program selected by the employee.
- H. Each unit member participating in this plan will earn sick leave in proportion to the percent of employment per year. Example: Fifty percent (50%) (half time) employment would yield sick leave of fifty percent (50%) of ten (10) days or five (5) days of sick leave. Such sick leave would be cumulative.
- I. The District will announce annually the availability of the Part-Time Employment Plan to all employees.
- J. All provisions of this program will be available to each employee through building principals and administrative department heads.
- K. Participating employees will be scheduled for individual meetings by the Division of Human Resources to develop a mutually agreeable program for the employee on or before May 30.
- L. Where two (2) or more employees apply for the same part-time positions, such position shall be filled by the employee with the greatest District-wide seniority.
- M. Employees who participate in the part-time employment program will perform extra duties proportionate to full-time employees. (Half-time employees will perform half as many duties as full-time employees.)
- N. Upon written request by an authorized Association representative, the District shall provide the Association with a list of unit members who have been approved for part-time employment for the following year.
- O. The Agreement between the District and the participating unit member shall be consummated on or before June 10. (The unit member may be accompanied by an Association representative in any meeting he/she attends with the District, pursuant to this article.)
- P. Application for participation in the program shall be completely voluntary and at the discretion of the employees.