

Dallas School District 2

Code: **GDBF-A**
Adopted: 7/22/02
Readopted: 10/25/04, 4/09/07, 4/17/08,
9/08/08

Retirement Option Benefit for Classified Staff

EMPLOYEES HIRED PRIOR TO 7/1/1989

It is an important goal of the School Board to maintain the highest standards of instructional and management performance in the most cost effective manner. The School Board is also committed to personnel practices which meet the important needs of the District and provide the greatest opportunities for the personal and professional fulfillment of its classified staff members within the context of this goal.

ELIGIBILITY

Current employees who have a minimum of ten (10) years of service with the District are eligible for retirement under this policy. Employees must also meet the insurance carrier eligibility requirements at the time of retirement to be eligible for medical retirement benefits. Only applies to employees working four (4) hours per day or more on a regular basis. Regular basis is defined as:

- A. Employees working in positions that are 4 hours a day or more for five of the six final years of employment;
- B. Employees voluntarily accepting positions that are less than 4 hours per day will not be eligible for the retirement program if as a result of a voluntary reduction in hours the employee does not meet the criteria in "A" above;
- C. Employees whose hours have been reduced by the district to be less than 4 hours per day will still receive benefits under the retirement program unless the employee refuses additional hours when offered.

APPLICATION PROCESS

For the purpose of obtaining retirement benefits available this policy, an employee of the District must, in addition to satisfying all of the conditions of said policy, at the same time, be eligible for and receiving a service retirement allowance or disability retirement allowance under the Public Employees Retirement System (PERS) based on his/her separation from service with the District. An employee who is not entitled to and who is not receiving such PERS service or disability retirement allowance as a consequence of his/her separation from service with the District shall not be entitled to any benefits under said policy.

Any staff member interested in any of the Retirement Options shall apply in writing to the Superintendent at least 90 calendar days preceding the proposed retirement date. Upon request, the Superintendent may grant exceptions to this timeline. The applicant staff member must meet the service requirement as provided in this policy. A Retirement Contract shall be signed by the Retiree and, upon approval by the School Board, by the Superintendent. This contract shall specify the terms under which benefits shall be granted.

COMPENSATION

A stipend shall be awarded for accumulated unused sick leave hours (excluding sick leave hours which the Retiree may elect to contribute to the District Sick Leave Bank or which may be used to calculate Retirees Public Employee Retirement System [PERS] benefits) according to the following schedule:

Number of Unused Sick Leave Hours	Stipend Per Month
At least 800 hours	\$50.00
At least 1,200 hours	\$75.00
At least 1,600 hours	\$100.00

Retiree shall be entitled to one (1) year of stipend benefits under this option for each two (2) fiscal years of service to the District, provided, however, no stipend shall be payable after the Retiree reaches the age at which he or she is eligible to receive full Social Security benefits or at such earlier time as Retiree makes application for and receives Social Security benefits.

In case of death, compensation shall be continued to the surviving spouse until June 1 following.

HEALTH BENEFITS

A Retiree shall be eligible to participate in the District's approved health plan. A Retiree shall be entitled to one (1) year of benefits for each two (2) fiscal years of service to the District, provided however, no benefit shall be payable after the Retiree reaches the age at which he or she shall be eligible to receive Medicare benefits whether or not Retiree applies for or receives such benefits. The District shall pay up to the current cap for plans available to retirees. Effective July 1, 2008, the district will apply the same insurance contribution cap toward participants in the retirement program as is set forth in the current collective bargaining agreement and all successor agreements between Dallas Chapter No. 24 Oregon School Employees Association and Polk County School District No. 2. The district will follow insurance carrier guidelines and applicable Oregon law in allowing retiree to change health plans.

In case of death, the surviving spouse will be provided the opportunity to purchase health insurance, if available, on a self-pay basis until the Retiree would have otherwise reached the age at which he or she would have been entitled to receive Medicare benefits.

Any disagreement arising under this policy shall be resolved through the District's Complaint Policy.

END OF POLICY

Legal Reference(s):

[ORS Chapter 237](#)
[ORS Chapter 239](#)

[ORS 243.303](#)
[ORS 743.619](#)