

Richard H. Hinds, Chief Financial Officer
Financial Services

**SUBJECT: RETIREMENT INCENTIVE/SABBATICAL LEAVE
PROGRAMS FOR UNITED TEACHERS OF DADE (UTD)
BARGAINING UNIT EMPLOYEES**

**COMMITTEE: INNOVATION, EFFICIENCY & GOVERNMENTAL
RELATIONS**

**LINK TO DISTRICT
STRATEGIC PLAN: IMPROVE FINANCIAL SERVICES**

At the Board meeting of November 18, 2008, Agenda Item Replacement E-67, the Board authorized the creation of a Retirement Incentive Program and a Sabbatical Leave Program which included various employee groups including employees represented by United Teachers of Dade (UTD).

The original authorization provided a Sabbatical Leave Program for Instructional employees on Steps 17-22 of the AO/CO Salary Schedule, but did not include other UTD bargaining unit employee groups which were included in the Retirement Incentive Program's eligibility. While the inclusion of these other UTD employee groups was effectively cost neutral, it was determined that placing these employees when their leave expired might be difficult, so they were not originally included. During negotiations to effectuate the Board's authorization, UTD expressed an interest to offer the Sabbatical Leave Program to the following groups, in addition to the already authorized Instructional employees:

- Paraprofessionals/School Support on Step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

In order to effectuate both the Retirement Incentive and Sabbatical Leave Programs for UTD bargaining unit employees, staff has successfully negotiated the terms of including these groups into the Sabbatical Leave Program. Staff is recommending that the Board authorize the additional UTD employee groups and enter into a Memorandum of Understanding (MOU) with the UTD. Due to a delay in the effective date of both programs, the revised eligibility and benefit dates are outlined for the UTD bargaining unit employees as follows:

E-68

Retirement Incentive – Eligibility

- Instructional personnel on Steps 20, 21, 22 of the AO/CO Salary Schedule
- Paraprofessionals/School Support on Step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

Retirement Incentive – Benefits

- UTD bargaining unit employees who retire/separate from service (DROP) with a termination date of January 30, 2009 would receive Board-paid health insurance consisting of the lowest cost Board-paid program, excluding flex benefits and dependents subsidies, not to exceed 36 months. Benefits would cease when an employee on the Retirement Incentive becomes Medicare eligible.

Sabbatical Leave – Eligibility

- Instructional employees on Steps 17-22 of the AO/CO Salary Schedule
- Paraprofessionals/School Support on Step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

Sabbatical Leave – Benefits

- UTD bargaining unit employees would be placed on Sabbatical Leave status effective February 2, 2009 through June 30, 2009, with an option to extend the leave through June 30, 2010. While on leave, employees would receive Board-paid benefits and a nominal monthly stipend (\$100/month) to provide Florida Retirement System (FRS) credit while on leave. Employees choosing to return from Sabbatical Leave would be guaranteed a position of like status in the system at salary levels in force at the time of return from leave. Employees who reach their end of DROP would separate from service from their leave status.

RECOMMENDED:

That The School Board of Miami-Dade County, Florida authorize the following provision for the Retirement Incentive and Sabbatical Leave Programs for UTD bargaining unit employees and approve the Memorandum of Understanding (MOU) as follows:

1. Retirement Incentive – Eligibility

- Instructional personnel on Steps 20, 21, 22 of the AO/CO Salary Schedule
- Paraprofessionals/School Support on step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

Retirement Incentive – Benefits

- UTD bargaining unit employees who retire/ separate from service (DROP) on or before January 30, 2009 would receive Board-paid health insurance consisting of the lowest cost Board-paid program, excluding flex benefits and dependents subsidies, not to exceed 36 months. Benefits would cease when an employee on the Retirement Incentive becomes Medicare eligible.

2. Sabbatical Leave – Eligibility

- Instructional employees on Steps 17-22 of the AO/CO Salary Schedule
- Paraprofessionals/School Support on Step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

Sabbatical Leave – Benefits

- UTD bargaining unit employees would be placed on Sabbatical Leave status effective February 2, 2009 through June 30, 2009, with an option to extend the leave through June 30, 2010. While on leave, employees would receive Board-paid benefits and a nominal monthly stipend (\$100/month) to provide Florida Retirement System (FRS) credit while on leave. Employees choosing to return from Sabbatical Leave would be guaranteed a position of like status in the system at salary levels in force at the time of return from leave. Employees who reach their end of DROP would separate from service from their leave status.

RHH:sbc

**M-DCPS/UTD
MEMORANDUM OF UNDERSTANDING**

Pursuant to Replacement Agenda Item E-67 of November 18, 2008 and Agenda Item E-68 of January 14, 2009, the School Board of Miami-Dade County, Florida, authorized the creation of a Retirement Incentive Program and a Sabbatical Leave Program. Further, pursuant to the provisions of Article XIV, Section 20, of the current labor agreement between Miami-Dade County Public Schools (M-DCPS) and the United Teachers of Dade (UTD), the parties have met to discuss the Retirement Incentive/Sabbatical Leave Programs.

Accordingly, the parties have agreed to the following:

I. Retirement Incentive – Employee Benefits

- Eligible employees who elect to retire or separate from service through the Deferred Retirement Option Program (DROP) on January 30, 2009 would receive Board-paid health insurance consisting of the lowest cost Board paid program, excluding flex benefits and dependent subsidies, not to exceed 36 months. Benefits would cease when an employee on the retirement incentive becomes Medicare eligible. Employees who do not provide the Florida Retirement System (FRS) with the necessary documents to finalize their retirement application and to be placed on the retiree payroll, are still bound by the terms of this incentive and their separation will be considered a resignation.

Retirement Incentive Eligible Employees

- Instructional Personnel on Steps 20, 21, 22, of the AO/CO Salary Schedule
- Paraprofessionals on Step 15 of the U1 Salary Schedule
- School Support Personnel on Step 15 of the U1 Salary Schedule
- Office Employees on Step 14 of the UO Salary Schedule

II. Sabbatical Leave – Employee Benefits

- Eligible employees will be placed on Sabbatical Leave status effective February 2, 2009 through June 30, 2009, with an option to extend the leave through June 30, 2010. This Sabbatical Leave will be provided for personal and professional growth activities that will be beneficial to the Miami-Dade County Public Schools. In exchange for this consideration employees will receive Board-paid benefits and be paid \$100/month. The School Board will pay the Florida Retirement System (FRS) contributions on this monthly payment, so the employee will receive retirement credit while on leave. Employees considering this option should consult with the Florida Retirement System (FRS) personnel to determine if there will be any impact on final retirement benefit calculations.

Employees choosing to return from Sabbatical Leave would be guaranteed a position of like status, for which they are qualified, in the system at salary levels in force at the time of return from leave. Employees terminating during the course of the Sabbatical Leave because of the conclusion of their DROP participation period will not receive any of the Sabbatical Leave benefits after the DROP end date.

Sabbatical Leave - Eligible Employees

UTD Bargaining Unit employees not presently on a Board-approved leave who meet the following criteria:

- > Instructional employees on Steps 17-22 of the AO/CO Salary Schedule
- > Paraprofessionals on Step 15 of the U1 Salary Schedule
- > School Support Personnel on Step 15 of the U1 Salary Schedule
- > Office Employees on Step 14 of the UO Salary Schedule

The Retirement Incentive/Sabbatical Leave Programs will be subject to review and/or modification at the end the 2008-2009 school year.

Dated this 14th day of January, 2009.

**THE SCHOOL BOARD OF MIAMI-DADE
COUNTY, FLORIDA**

THE UNITED TEACHERS OF DADE

Dr. Solomon C. Stinson
Chair

Ms. Karen Aronowitz
President

Dr. Marta Pérez
Vice Chair

Mr. Alberto M. Carvalho
Superintendent of Schools

APPROVED AS TO FORM

School Board Attorney