January 21, 2015

TO: Principals/Department Heads

FROM: Amanda Bailey, Chief Human Resources Officer

VIA: Robert W. Runcie, Superintendent of Schools

SUBJECT: RETIREMENT/RESIGNATION EARLY NOTIFICATION INCENTIVE

Effective January 12, 2015 the District is implementing an Early Notification Retirement/Resignation Incentive Rewards Program. The program goal is to maintain high quality instruction in every classroom by awarding eligible instructional employees who provide early notice to the District of their intent to retire/resign. The program award for this year is a one-time $500 payment and two (2) months of continued employee benefits. This program will allow our teachers an opportunity to plan for their retirement and/or separation from the District. Further, this program is intended to support our students with continued high quality instruction in every classroom.

Attached please find a copy of:

- Overview of Program Details
- Frequently Asked Questions (FAQ)
- Form to Separate Employment for Resignation or Retirement

Please ensure that you forward the attachments to staff via CAB. These documents will also be available on both the Benefits & Employment Services and the Talent Acquisition & Operations (Instructional) websites. For your convenience, you will receive 10 – 11x17 copies of the Program Overview Flyer to be posted throughout your school, no later than January 23, 2015.

The employee must submit the form to you by the date indicated on the flyer. You must then submit the form to the Benefits & Employment Services Department via CAB at benefits@browardschools.com within five (days) of receipt.

Should you have any questions or require additional information, please contact Dr. Dildra Martin-Ogburn, Director, Benefits & Employment Services at 754-321-3100 or dildra.ogburn@browardschools.com or Ms. Susan Rockelman, Director, Talent Acquisition & Operations (Instructional & Non-Instructional) at 754-321-2324 or susan.rockelman@browardschools.com.

c: Superintendent’s Cabinet
Dr. Dildra Martin-Ogburn, Director, Benefits & Employment Services
Susan Rockelman, Director, Talent Acquisition & Operations, Instructional & Non-Instructional
Q. **What is the Retirement/Resignation Early Notification Incentive Program?**
A. The Retirement/Resignation Early Notification Incentive Program awards eligible Instructional employees with the opportunity to earn $500 and two (2) months of continued benefits valued at approximately $1,277.

Q. **Why has the District created this program?**
A. The program objective is to assist employees/schools and work locations in their transition and to identify instructional vacancies as early as possible. The program’s goal is to maintain high quality instruction in every classroom.

Q. **Who is eligible to participate in this program?**
A. K-12 Instructional employees who are retiring or resigning between the months of April 2015 – September 2015, submit notification to their location by the date indicated on the flyer and meet the following criteria:

- K-12 Instructional employees who are **retiring (not in DROP)** or **resigning** between April 2015 – September 2015 who meet the following criteria:
  - Classroom Teachers must have a caseload of students (not applicable to Teachers who travel around the District or pull students out of classrooms)
  - Student Support Staff:
    - ESE Specialists,
    - Guidance Counselors,
    - Media Specialists,
    - School Psychologists,
    - Social Workers, and
    - Speech Language Pathologists

Q. **What defines a “caseload of students”?**
A. A caseload of students is defined as a Classroom Teacher who has a roster of students assigned to him/her. This definition does not include Teachers who travel throughout the District or provide individual instruction to students during class time.

Q. **How do I apply for the program award?**
A. Eligible employees who are retiring or resigning between the months of April – September 2015 must complete the **Separation of Employment Resignation and Retirement Form** and submit it to their Principal/Supervisor by the **deadlines outlined below**:
  - **Retirement**: February 27, 2015
  - **Resignation**: April 2, 2015
Q. When will I receive my program award?
A. You will receive your cash award the month following your retirement/resignation from the District. For example, if you retire/resign in the month of August, you will receive your award by the end of September and your Benefits will continue through October 31st.

Q. Is the $500.00 cash award FRS credible?
A. No. In accordance Chapter 2 of the Florida Retirement System (FRS) Employer Handbook, the $500.00 cash award is non FRS credible.

Q. When do my continued Benefits begin?
A. Your two (2) months of continued benefits will begin the month following your retirement/resignation from the District. For example, if you retire/resign in August, your District paid Benefits will continue throughout September and October and end October 31, 2015.

Q. I work in a Non-Instructional position; is there a program for me?
A. No. At this time, the District’s goal is maintain instruction at schools/locations with qualified teachers for the 2015 - 2016 school year. This pilot program is intended to assist in this goal, and includes K-12 Instructional positions.

Q. I have dependents on my health care coverage. Is my family coverage or dependent(s) included in the extension?
A. Yes. K-12 instructional employees meeting the above-noted criteria and who have dependents enrolled at the time of their retirement/resignation will be included for dependent coverage during the continued two (2) month period of time.

Q. I am a hospital/homebound teacher. Am I eligible?
A. No. Please refer to the eligibility criteria listed above.

Q. I teach Pre-K. Why are Pre-K teachers ineligible?
A. Teachers who are included in the eligibility criteria must work with academic students at the Kindergarten - 12 levels.

Q. Does this apply to Family Counselors?
A. No. Please refer to the eligibility criteria listed above.

Q. What if I submit my retirement and then change my mind?
A. After retirement paperwork has been processed by the Benefits Department, employees cannot rescind the decision.
Q. Will I receive written verification of my health insurance continuation?
A. Yes, you will receive a document, confirming the two-month continuation of your District paid health care benefits. If you are currently paying for insurance for yourself, for example enhanced coverage(s) and/or your dependents at the time of separation from the District, you will receive an Invoice for those costs from the Benefits & Employment Services Department.

Q. My family's plans are up in the air. What if I am only able to give a short notice of my plan to resign/retire. Will I receive any benefits continuation or cash award?
A. No. Eligible employees who are retiring/resigning between the months of April-September 2015 must meet the following notification deadlines:

- Retirement: February 27, 2015
- Resignation: April 2, 2015

Q. I plan to retire in 2016. Will this program be available to me?
A. Superintendent Runcie has initiated this pilot program for 2015. The program will be evaluated throughout 2015.
Benefits & Employment Services

EARLY NOTIFICATION INCENTIVE
NOTIFY EARLY - EARN REWARDS

PROGRAM PURPOSE:
Maintaining High Quality Instruction in our classrooms

PROGRAM HIGHLIGHTS:
- Cash Reward: Earn $500 Early Notification Incentive
- Paid Benefits: Earn $1,277 of Benefits Coverage after retirement/resignation

Eligible employees who are retiring or resigning between the months of April - September, 2015 must notify their Principal/Supervisor as outlined below:

Retirement - February 27, 2015
Resignation - April 2, 2015
(Notification must be received and date stamped by the location, by the dates listed above.)

Your Benefits will be extended for two (2) months after the month in which you retire/resign.

FOR EXAMPLE:
If you retire/resign in the month of April, your Benefits will be paid through the end of June. If you retire in June, your Benefits will be paid through the end of August.

K-12 instructional employees who are retiring (not in DROP) or resigning between April - September.

CRITERIA:
- Classroom Teachers and must have a caseload of students (not applicable to Teachers who travel around the District or pull students out of classrooms)
- Student support staff (ESE Specialists, Guidance Counselors, Media Specialists, School Psychologists, Social Workers, and Speech Language Pathologists).

In order to apply, you must complete and submit the Separation of Employment (Resignation and Retirement) Form in accordance with the timeline listed on the left. The form can be found on the Benefits Department’s website at www.browardschools.com/benefits or on the Talent Acquisition & Operations - Instructional Staffing website at www.broward.k12.fl.us/teacher.

For additional information regarding the Early Notification Incentive program, please contact the Benefits Department at (754) 321-3100 or via email at benefits@browardschools.com.
**SEPARATION OF EMPLOYMENT RESIGNATION AND RETIREMENT FORM**  
**CHOOSE ONE: ☐ RESIGNATION ☐ RETIREMENT**  
**COMPLETE IF RESIGNING OR RETIRING FROM BROWARD COUNTY PUBLIC SCHOOLS**  
**THIS ACTION TERMINATES THE EMPLOYEE FROM THE DISTRICT.**

- If the employee is **resigning** from Broward County Public Schools, attach this form to the Separation of Employment iForm.
- If the employee is **retiring**, the employee **must** meet with the Benefits Department. The Benefits Department will forward this form to the location and HRIS. No action is required by the location.

**EMPLOYEE INFORMATION**

<table>
<thead>
<tr>
<th>TYPE OF EMPLOYEE:</th>
<th>☐ INSTRUCTIONAL</th>
<th>☐ NONINSTRUCTIONAL</th>
</tr>
</thead>
</table>

**LAST NAME** | **FIRST NAME** | **MI** | **SAP PERSONNEL NUMBER** |

**LOCATION #** | **LOCATION NAME** | **POSITION TITLE** | **EFFECTIVE DATE OF SEPARATION/RETIREMENT FROM BROWARD COUNTY PUBLIC SCHOOLS** *(THIS IS THE FIRST DAY YOU ARE NO LONGER EMPLOYED BY SBBC):* ________________________

**ACCESS ESS TO VERIFY/UPDATE YOUR PERMANENT ADDRESS. YOUR LAST PAYCHECK WILL BE MAILED TO YOUR PERMANENT ADDRESS.**

**Indicate the PRIMARY reason for your voluntary separation (choose one):**

- Accepted a job not in another School District (51/C/M)
- Accepted a job in another Florida School District (49/B/M)
- Accepted a job in another School District outside of Florida (50/L/M)
- Dissatisfied with Pay (43/D/A)
- Dissatisfied with Working Conditions (48/D/D)
- Family Obligation (42/E/F)
- Inadequate Benefits (52/E/K)
- Lack of Opportunity for Advancement (X/E/B)
- Non-job connected due to medical reasons (61/E/M)
- Military (70/E/M)
- Personal (44/E/F)
- Relocation (46/E/H)
- Retirement (30/A/I)
- Retirement Advance Notification (30/A/I)
- Retirement/Disability (31/A/I)
- Returned to School (47/E/G)
- Resigned in Lieu of Termination During Probationary Period (07/N/E)

**Please rate your level of satisfaction in the following areas** *(1 = least satisfied, 5 = most satisfied)*

- Salary ________ Benefits________ Work Environment_____ Training/Orientation____________________
- Administrative Support ________ District Support ________

**Additional Information to be Completed by Instructional Employees:**

- Accepted another teaching position:
  - At a non-public school within the District (A)__________
  - Within another district in Florida (B) _______________
  - Outside the State of Florida (C) _________________

- Accepted another position in the field of education:
  - Within another district in Florida (E) _______________
  - Outside the state of Florida (F) ________________

- Accepted a position other than teaching or the field of education:
  - Within another District in Florida (H)
  - Outside the State of Florida (I)

- Not Applicable
  - Declines to disclose future plans (Y)
  - Has not accepted employment elsewhere (Z)

**Employee’s Signature:________________________ Date:________________________**

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**HR Division Use Only:**

$ ______________________

Retirement/Resignation Funding ______________________

Incentive Amount ______________________ Wage Type ______________________

Benefits end date ______________________ Processor Name & Date ______________________ Reference # ______________________

Form #4049 Revised 11/2/14
EARLY NOTIFICATION INCENTIVE INSTRUCTIONS

EMPLOYEES

HOW TO APPLY?

Eligible instructional employees who are retiring or resigning between the months of April – September 2015 must follow the instructions outlined below:

1. Complete the Separation of Employment (Resignation & Retirement) Form (attached)
2. Submit the completed form to your principal/supervisor by the deadline date noted below:
   a. Retirement: February 27, 2015
   b. Resignation: April 2, 2015

NOTE: Location must date-stamp your form at the time of receipt.

3. Obtain a copy of the date-stamped form for your records

● RETIRING

For those employees who are retiring, in addition to completing the Separation of Employment (Resignation & Retirement) Form, you must contact the Benefits Department to schedule a Retirement Appointment.

● When scheduling your appointment, please inform the Retirement Staff that you are retiring as a result of the Early Notification Retirement/Resignation Incentive.

LOCATIONS

● RESIGNATIONS

1. Employee submits completed Separation of Employment (Resignation & Retirement) Form to principal/supervisor
2. Location date-stamps the form and gives employees a copy
3. Location creates an Iform within 48 hours & attaches date-stamped form
4. Location scans and emails form with five (5) days to the Benefits Department at benefits@browardschools.com. In the SUBJECT LINE type Early Notification Documents-Employee’s Name