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Board Cover Memorandum

To Board of Education

From Jenine Lindsey, General Counsel

Meeting Date August 28, 2024

Subject Exemption to the Separation-From-Service Requirement - California State Teachers Retirement System (CalSTRS)

Ask of the Board Approval by the Board of Education of Resolution No. 2425-0003, authorizing the District to request an exemption to the 180 calendar day Separation-From-Service Requirement on behalf of three teachers who recently retired from the District and are members of the California State Teachers Retirement System (CalSTRS).

Background Pursuant to Education Code sections 24214.5 and 26812, there is a 180 calendar day separation-from-service requirement for all retired CalSTRS members and participants receiving an annuity.

To circumvent the shortage of teachers within the District, and while the District continues its' efforts to recruit qualified teachers to ensure each student is receiving highly skilled and qualified services, the District intends to seek an exemption on behalf of the three teachers who worked for the District and wishes to return to the District as substitutes and fill critically needed teaching positions.

Discussion Approval by the Board of Education of Resolution No. 2425-0003, authorizing the District to request an exemption to the 180 calendar day Separation-From-Service Requirement on behalf of three teachers who recently retired from the District and are members of the California State Teachers Retirement System (CalSTRS).

Fiscal Impact Any Fiscal impact will be within the District's ability to cover

Attachment(s) ● 2425-0003

RESOLUTION OF THE BOARD OF EDUCATION OF THE OAKLAND UNIFIED SCHOOL DISTRICT

RESOLUTION NO. 2425-0003

**EXEMPTION TO THE SEPARATION-FROM-SERVICE REQUIREMENT
PURSUANT TO SECTION 24214.5 OR 26812 OF THE EDUCATION CODE**

WHEREAS, pursuant to Education Code section 24214.5 and 26812, there is a 180 calendar day separation-from-service requirement for all retired CalSTRS members and participants; and,

WHEREAS, all retired CalSTRS members and participants are subject to a restriction if they perform retired member activities as defined by section 22164.5 of the Education Code or retired participant activities as defined by section 26135.7 of the Education Code, during the first 180 calendar days after their most recent retirement; and,

WHEREAS, if the retired CalSTRS member or participant performed retired member or participant activities during this period, CalSTRS will reduce his or her retirement benefit or annuity one dollar for each dollar earned for performing retired member or participant activities during the 180-day period; and,

WHEREAS, there is an exemption from the 180 calendar day separation-from-service requirement for a member or participant who retires from service and is at or above normal retirement age; and,

WHEREAS, in order to qualify for this narrow exemption, the employer must appoint the retired member or participant to a critically needed position that has been approved by the governing body of the employer in a public meeting as reflected in a resolution; and,

WHEREAS, this approval by the governing body of the employer in a public meeting as reflected in a resolution must be finalized and communicated to CalSTRS before the member or participant commences to perform retired member or participant activities; and,

WHEREAS, the Superintendent of Schools must complete the *Request for SeparationfromService Requirement Exemption* form, which must be submitted to CalSTRS and received by CalSTRS before the member or participant commences to perform retired member or participant activities,

NOW THEREFORE, BE IT RESOLVED that the Board of Education does provide public notice that the District is in critical need of experienced substitute teachers to fill critically needed teaching positions because there is a State-wide shortage of qualified teachers.

AND BE IT FURTHER RESOLVED that the Board wishes to meet this critical need by hiring the following individual, who is a member or participant who retired from service less than 180 days ago or who will retire;

- 1. Thomas Mason McKinley**
- 2. Beth Fisch**
- 3. Patricia Wong**

AND BE IT FURTHER RESOLVED that this appointment is needed to fill this critical need before the 180 calendar day separation-from-service requirement is fulfilled;

AND BE IT FURTHER RESOLVED that the member or participant did not receive additional service credit pursuant to California Education Code section 22714 or 22715;

AND BE IT FURTHER RESOLVED that the member or participant did not receive a retirement incentive or any financial inducement to retire from any public employer; ·

AND BE IT FURTHER RESOLVED that the retired member's or participant's termination of employment is not the basis for the need to acquire his or her services;

AND BE IT FURTHER RESOLVED that the earnings for retired member activities during the 180 calendar days will still be subject to the annual postretirement earnings limit for the Defined Benefit Program;

AND BE IT FURTHER RESOLVED that members or participants listed will not commence to perform retired member or participant activities before this approval is authorized by the governing body of the employer in a public meeting as reflected in a resolution and received by CalSTRS;

AND BE IT FURTHER RESOLVED that the member or participant will not commence to perform retired member or participant activities before the Superintendent of Schools completes the *Request for Separation-from-Service Requirement Exemption* form and this is transmitted to and received by CalSTRS.

PASSED AND ADOPTED by the Governing Board of the Oakland Unified School District on August 28, 2024, by the following vote:

PREFERENTIAL AYE:

PREFERENTIAL NOE:

PREFERENTIAL ABSTENTION:

PREFERENTIAL RECUSE:

AYES:

NOES:

ABSTAINED:

RECUSE:

ABSENT:

CERTIFICATION

We hereby certify that the foregoing is a full, true and correct copy of a Resolution passed at a Regular Meeting of the Board of Education of the Oakland Unified School District held on June 30, 2021.

Legislative File	
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By:	

OAKLAND UNIFIED SCHOOL DISTRICT

Benjamin Davis
President, Board of Education

Kyla Johnson-Trammell
Superintendent and Secretary, Board of Education