



HUMAN RESOURCE SERVICES and LEADERSHIP DEVELOPMENT

Office of the Director

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Please Post Immediately
Immediate Attention Required

STRS Member Service Credit ALERT **To All Employees Enrolled in CalSTRS**

CalSTRS has notified school districts that some positions may not be eligible for CalSTRS retirement service credit. An earlier circular issued by CalSTRS stated in part:

In order for a position to be creditable to CalSTRS the position must be an academic position performing duties involved in the instruction, curriculum or material development, school health professionals, counselors, librarians, or superintendents. A position that is responsible for supervising such positions is deemed to be an academic position therefore creditable to CalSTRS. **The specific title given the employee, whether it is, for example, director, dean, or chief, does not determine whether the service is creditable to CalSTRS. Rather, it is the nature of the duties performed by the employee that will determine whether the service is creditable to CalSTRS.** Positions that are not deemed as academic are considered classified and subject to coverage by a different public retirement plan.

Examples of positions that are not reportable to CalSTRS are:

- Chief of Police
- Director of Buildings, Grounds, and Maintenance
- Director of Human Resources
- Chief Information Technology Officer
- Director of Payroll Services
- Chief Financial Officer

Question 1: What should you do to protect your CalSTRS retirement if you believe any of your prior positions may have been similar to those listed as examples and/or not an academic position performing duties as underlined above?

Response 1: Selected STRS members have been identified by the District to receive a complete packet from LBUSD. If you do not receive a packet by February 10, 2014 and believe that you may be impacted, **email HRSHELP@lbschools.net** with the subject line "*STRS Retirement Election*" to request a packet. If you are on a Leave of Absence or a former employee and have been identified by the District, a complete packet will be mailed to you. Packets will be mailed to the last address on file with LBUSD.

Question 2: What is the time line for you to act if you believe that you may be impacted?

Response 2: The district can't guarantee processing any paperwork received after **April 11, 2014** since all documents must be received no later than May 23, 2014 by CalSTRS in Sacramento. It will be

important for you to act well before the deadline. Impacted employees will be responsible for providing all completed forms to LBUSD.

Question 3: What is the solution to this issue?

Response 3: CalSTRS has opened the window to allow employees who may have been impacted to submit the necessary forms before the deadline. Employees are encouraged to act now if this may be applicable to your current or prior positions.

Question 4: What may happen if you choose not to take action?

Response 4: CalSTRS decides if an employee's service is creditable in the STRS retirement system. If there was an audit, CalSTRS does have the authority to question if an employee's service met the threshold for being an academic position. Your retirement could be impacted if CalSTRS determined that you had provided service in a nonacademic position without submitting the appropriate CalSTRS election form.

Question 5: Will the District send out additional information?

Response 5: No. If you did not receive a packet from LBUSD, this will be your only notification to request a packet within this limited window of opportunity.

Question 6: Where can you go to find out additional information on your own?

Response 6: The following documents may be accessed from the CalSTRS website:

<http://www.calstrs.com/>

EIC12-1 Volume 28 Issue 1

EIC 13-3 Volume 29 Issue 3

CalSTRS 800.228.5453

<http://www.lbschools.net>

HRS Website → Current Employees → CalSTRS Remedy

Key Points

- If you did not receive a packet and you believe that this information is applicable to you, request a packet via email at HRSHELP@lbschools.net **after** February 10, 2014. Please include the following information in the subject line: "*STRS Retirement Election*"
- Remember that there are strict deadlines for the submission of the required documents.
- Documents may not be faxed.
- **District Deadline: April 11, 2014**