ARTICLE 4b
UNIVERSITY RETIREMENT & SAVINGS PLANS

A. GENERAL CONDITIONS

Eligible employees may participate in a number of retirement plans generally available to other eligible non-managerial, non-supervisory, non-confidential, non-academic employees of the University, except as provided below.

B. RETIREMENT AND SAVINGS PLANS

1. The University maintains several retirement and savings plans for eligible University employees. Currently, such plans include but are not limited to, the UC Retirement Plan (UCRP), Tax-Deferred 403(b) Plan, Defined Contribution Plan (DCP) and 457 (b) Deferred Compensation Plan, which collectively constitute the University of California Retirement System (UCRS).

For UCRP-eligible employees hired or rehired following a break in service or who become UCRP eligible between July 1, 2013 and a date no later than October 31, 2018, the pension benefits shall be as follows:

The 2013 Tier benefit provisions shall apply, with two exceptions:
The earliest retirement age and age factors shall be the same as for the 1976 Tier (2.5% age factor at age 60, eligible for early retirement at age 50). Retiring employees may elect either a lump sum cash-out of pension benefits or annuitized payments (same as 1976 Tier payment option). All UCRP-eligible bargaining unit employees (regardless of date of hire or UCRP tier placement) shall contribute a gross rate of 9% to UCRP effective the first full bi-weekly pay period on or after July 1, 2014. The contributions for employees who are 1976 Tier members will continue to be offset by $19 per month.

Retirement Choice Program

Effective November 1, 2018, the Retirement Choice Program (Pension Choice and Savings Choice) will apply to all eligible employees in the EX unit hired, rehired following a break in service, or who become UCRP eligible on or after November 1, 2018, on the same terms as applied to non-represented staff employees.

Retiree Health Eligibility

Any bargaining unit employee in a UCRP eligible position as of December 31, 2013 will be grandfathered for the purpose of determining retiree health program...
eligibility (graduated eligibility beginning at age 50 with 10 years of service credit).

Any employee hired or rehired following a break in service, or who becomes UCRP eligible after December 31, 2013 will be subject to the new Graduated Retiree Health Program Eligibility (graduated eligibility beginning at age 56 with 10 years of service credit), as shown in Appendix G.

C. EFFECT OF ABSENCES FROM WORK

1. Leaves of Absence Without Pay – Approved leave without pay shall not be considered a break in service. The provisions of the applicable retirement plan regulations determine the effects of such leave without pay on retirement benefits.

2. Family Medical Leave Act – Retirement benefits shall be continued in accordance with the provisions of the applicable retirement plan regulations.

D. ENUMERATION OF UNIVERSITY BENEFITS

1. For informational purposes only, a brief outline of UCRS programs in effect on the date the Agreement is signed is found in Appendix B. AFSCME understands and agrees that the descriptions contained in Appendix B do not completely describe the coverage or eligibility requirements for each plan, the details of which have been independently communicated to AFSCME.

2. Specific eligibility and benefits under each of the various plans are governed entirely by the terms of the applicable Plan Documents and regulations, and state and federal laws. Employees in an ineligible classification are excluded from coverage, regardless of appointment percent and average regular paid time. For details on specific eligibility for each plan, refer to the applicable documents, agreements, regulations, or contracts.