

**SIDE LETTER  
UCSD Preuss Charter School**

Unless otherwise specified in this Side Letter, all provisions of the Non-Senate Faculty (IX) Collective Bargaining Agreement (hereinafter "Agreement") shall apply to Preuss Charter School bargaining unit members (hereinafter "Preuss" or "PCS").

The Preuss School charter establishes the following core principles, which will continue under the terms of this Side Letter:

- 1) Class Size – 35 maximum students in the academic classes;
- 2) Instructional Days – 198 days per year;
- 3) School Day – 8:55 a.m. – 4:00 p.m. (6 hours and 32 minutes per day);
- 4) Professional Development – 105 minutes per week per teacher.

The parties agree that the following terms apply specifically and exclusively to members of the Preuss Charter School bargaining unit:

**A. RECOGNITION**

On May 2, 2017, the Public Employment Relations Board issued a unit modification order (SF-UM-786-H) reflecting the addition of the Preuss Charter School Certificated Teachers, Resource Specialists and Librarians into the bargaining unit.

**B. DEFINITIONS**

1. References to "NSF" in the Agreement shall be "PCS bargaining unit members."
2. References to "Campus" shall be "UCSD."
3. References to "Department" shall be "Preuss Charter School."

**C. MODIFICATIONS**

The following articles in the Agreement shall be modified and apply only to Preuss Charter School. The modifications below replace the language in the respective articles in their entirety unless otherwise specified.

**Article 1 – Recognition**

The parties agree the bargaining unit includes the following title:

<u>Title Code</u>	<u>Name</u>	<u>Working Titles</u>
2440	K-12 Instructor – Academic Year	Certificated Teacher Resource Specialist Librarian
2441	K-12 Instructor – 1/10 payment	Certificated Teacher Resource Specialist Librarian

## **Article 2 – Academic Freedom**

The PCS bargaining unit members shall adhere to the provisions in the Charter.

## **Article 5 – Description of Unit Titles**

K-12 Instructors (TC 2440 and TC 2441) which includes the three working titles (Certificated Teacher, Resource Specialist, and Librarian) shall design, conduct, support, and manage comprehensive education program for K-12 students. Instructors create flexible programs and support a personal growth environment in accordance with each student's ability including supporting students, families in adjusting to structured education environment, and making appropriate lifestyle, career and vocational choices.

This description is in conjunction with and in addition to PCS job descriptions.

## **Article 6 – Academic Year Appointments**

For the continuity of benefits and retirement credit, annual PCS appointees shall be paid 10/12; however, when appointed for less than a full year, PCS appointees shall be paid monthly in accordance with Agreement – Article 6. B. of the Agreement.

### **1. 10/12 Academic Appointment**

The service period for PCS appointments shall be the start of fall semester through the end of spring semester. The pay period for PCS appointments shall be from July 1<sup>st</sup> through June 30<sup>th</sup>. Appointments are renewed annually and shall be 10/12 and treated the same as semester-based campus instructors. PCS appointees shall not be eligible for benefits prior to their enrollment in benefits programs for which they are eligible and will not contribute for months of ineligibility.

### **2. 1/10 Payment Academic Year Appointment**

The service period for partial PCS appointments may start mid-year. The pay period shall be monthly based on when the appointment began. PCS appointees shall not be eligible for benefits prior to their enrollment in benefits programs for which they are eligible and will not contribute for months of ineligibility.

## **Article 7 – Appointment and Reappointment**

### **1. General Provisions**

- a. The appointment of a PCS bargaining unit member neither creates an entitlement to nor precludes reappointment.
- b. Such appointment or reappointment shall have a definite beginning and ending date and shall terminate on the last day of the appointment set forth in the letter, except as provided in 3. b. provided below.
- c. The PCS has the sole discretion in regard to appointment and reappointment decisions.

- 1) For the first five (5) years of employment, PCS bargaining unit members shall receive one year appointments provided a performance rating of Meets Standards or above, as described in Article 10 of this Side Letter, has been achieved;
- 2) Upon completion of five (5) years of employment, PCS bargaining unit members shall receive two year rolling appointments, provided a performance rating of Meets Standards or above, as described in Article 10 of this Side Letter, has been achieved.
  - a) Provided the performance rating is Meets Standards or above, the PCS bargaining unit member shall receive a new two year appointment.
  - b) If the rating is Does Not Meet Standards, the appointment shall terminate on the last day in accordance with the appointment letter.
    - i. Should the PCS bargaining unit member receive a Meets Standards or above in the final year of the appointment, PCS shall have the sole discretion to offer a one year contract(s) for the following academic year(s).
    - ii. No merit increase shall be given in the year the PCS bargaining unit member does not meet standards nor shall there be a “catch up” regardless of whether future appointments are offered.
2. An appointment may be terminated prior to the established ending date only in accordance with Medical Separation, Discipline and Dismissal or Layoff provisions of either the Agreement or this Side Letter.

### 3. Letters of Appointment

- a. Letters of reappointment shall be issued by March 15<sup>th</sup>.
- b. Letters of appointment for partial-year appointments beginning after the service day of the academic year shall be issued to appointees no later than thirty (30) calendar days prior to the commencement of the service period, or as soon as practicable thereafter.
- c. When the University appoints or reappoints a PCS bargaining unit member, s/he shall be informed in writing of:
  - i) the title of the position;
  - ii) the salary rate;
  - iii) the period(s) for which the appointment is effective;
  - iv) the nature of the appointment and the general responsibilities;
  - v) the fact that PCS bargaining unit members are represented by UC-AFT;

vi) the fact that the terms and conditions of the appointment are contained in the Side Letter and Agreement.

### **Article 8 – Instructional Support**

The University shall provide access to facilities, services, texts and instructional support that is reasonably necessary for PCS bargaining unit members, including traveling teachers, to complete their assigned duties and responsibilities, including but not limited to:

- a. Office and desk space,
- b. Computer and internet connection;
- c. Training and support for web-based tools;
- d. Storage space;
- e. Office, laboratory and instructional equipment;
- f. Mailbox and email;
- g. Office supplies;
- h. Text, and/or reading materials;
- i. Photocopying equipment.

### **Article 9 – Professional Concerns**

1. All PCS bargaining unit members are eligible to apply for professional leaves in accordance with other leaves with or without pay. PCS bargaining unit members may be granted leave to attend professional meetings and programs. In each case payment of fees, payment of related costs, and pay status are at the sole discretion of the University.
2. When the University requires attendance at a professional meeting or program, the University will notify the PCS bargaining unit members in writing and will pay the fees and related costs. Programs which are suggested or recommended are not "required" within the meaning of this Article.
3. When a leave has been granted pursuant to this Article, the University will notify the PCS bargaining unit members in writing of the period of the leave, the pay status of the PCS bargaining unit members during the leave, and which fees or related costs, if any, will be paid.

### **Article 10 - Performance Evaluations**

1. PCS bargaining unit members in their first five (5) years shall be observed at least once each semester. PCS bargaining unit members in their six (6) year or more shall be observed at least once in an academic year. All PCS bargaining unit members shall be evaluated one time per year and shall focus on the attainment of the California Standards for the Teaching profession as referenced below. Should the state Standards change, PCS shall also adjust the performance standards for the next academic year.

- a. Engaging/Supporting all students in learning;
  - b. Creating/Maintaining Effective Environment;
  - c. Understanding/Organizing Subject Matter;
  - d. Planning Instruction;
  - e. Designing Learning Experiences;
  - f. Assessing Student Learning;
  - g. Developing as a Professional.
2. PCS bargaining unit members shall be evaluated as Distinguished, Proficient, Meets Standards or Does Not Meet Standards.
  3. Evaluations are not grievable or arbitrable.

#### **Article 11 – Benefits**

The PCS bargaining unit employees shall participate in health benefits, in accordance with Article 11, except as outlined in this Side Letter. All PCS bargaining unit members hired after this Side Letter is effective shall be eligible for UCRP under the same terms as University staff/academic employees. PCS shall be eligible for the choice pension plan and subject to the pension cap. Should PCS bargaining unit members exceed the cap, the additional compensation shall be 3% on all earnings above the cap and the 2016 UCRP Tier Side Letter shall not apply to PCS bargaining unit members.

#### **Article 12 – Leaves**

The following sections of Article 12 apply to PCS bargaining unit members who meet eligibility requirements: (1) Section A: General Provisions, except references that do not apply to PCS bargaining unit members; (2) Section B: Family and Medical Leave (FML); (3) Section C: Pregnancy Disability Leave; (4) Sections D.2, D.3, and D.4: Sick Leave; (5) Section E: Bereavement Leave; (6) Section F: Jury Duty; (7) Section G: Military Leave; (8) Section H: Military Caregiver Leave; (9) Section I: Qualifying Exigency Leave; (10) Section J: Military Spouse/Domestic Partner Leave; (11) Section K: Non-FML Parental Leave Without Pay for a maximum of twelve (12) weeks; (12) Section M: Voting; (13) Section N: Blood Donations; (14) Section O: Witness Leave; (15) Section P: Other Leaves/Personal Leaves, and; (16) Section R: Grievability and Arbitrability.

PCS bargaining unit members may use up to five (5) days of sick leave per academic school year for personal leave. When feasible, seventy-two (72) hours' notice will be provided, with approval within twenty-four (24) hours of the notice. No more than two (2) consecutive days shall be approved, unless there are extenuating circumstances.

#### **Article 14 – Holidays**

PCS observes the following paid holidays in accordance with SDUSD Calendar:

Labor Day

Veteran's Day

Thanksgiving Week (5 days)

Winter Break (10 days includes Christmas Eve, Christmas Day, New Year's Eve and New Year's Day)

Martin Luther King Jr. Day

Lincoln Day Observance

Washington Day Observance

Spring Break (5 days)

Memorial Day

#### **Article 17 – Layoff**

The University shall have the sole, non-grievable discretion to determine when layoffs are needed. Prior to the effective date of a layoff, PCS bargaining unit members shall receive ninety (90) calendar days' notice, or pay in lieu of notice where less notice is provided. The determination of which individuals shall be selected for layoff shall not be based solely on salary.

#### **Article 19 – Reassignment**

1. Reassignment is defined as a change of subject of a PCS bargaining unit member on during the term of an appointment (July 1 – June 30). Reassignment is not a form of corrective action. Reassignment shall be initiated by the University in consultation, whenever possible, with the PCS bargaining unit member involved. The University, upon request, will meet with the PCS bargaining unit member and/or the UC-AFT to discuss the reassignment; however, the scheduling of the meeting will not delay implementation.
2. A PCS bargaining unit member who applies for and accepts a position teaching a different subject is not considered to have been reassigned.

#### **Article 21 – Compensation**

##### **1. Academic Year**

The University's compensation program shall be to provide a step increase for each year in accordance with Appendix A, provided PCS bargaining unit members meet the established merit criteria and are deemed meritorious with a rating of Meets Standards or above, as described in Article 10 of this Side Letter.

2. Summer Session

- a. Compensation for summer session appointments shall be prorated based on the annual salary of the PCS bargaining unit member in effect as of June 30<sup>th</sup> prior to the summer session commencement.
- b. Summer Session appointments shall have a definite ending date, will comprise no more than five (5) days a week, and no more than six (6) hours per day, and shall terminate on the last day of the appointment set forth in the letter of appointment.

3. Longevity Pay

A longevity payment of fifteen hundred (\$1500.00) shall be awarded to PCS bargaining unit members each year who are at the maximum of the column and are merit eligible. Longevity payments are effective in June of each year, representing compensation for the past academic year.

**Article 22 – Merit Review Process**

The University is proposing to have a compensation program based on merit, which shall be determined annually based on established criteria. Merit decisions are not grievable or arbitrable.

**Article 24 – Instructional Workload**

PCS bargaining unit members shall teach three (3) of four (4) periods per day, with one preparation block open each instructional day.

**Article 26 – Release Time**

The University shall release no more than two (2) bargaining unit member(s) to negotiate successor Side Letters not to exceed four full (4) school days requiring substitutes. Should bargaining continue after the four days are exhausted, they shall be scheduled outside of school day hours. The UC-AFT shall notify the University at least thirty (30) days in advance with the name of the bargaining team member(s) to be released.

**Article 30 – Discipline and Dismissal**

1. General Provisions

- a. Discipline is a written censure, suspension without pay, or reduction in pay for misconduct and/or dereliction of academic duty.
- b. Dismissal is the termination of employment, initiated by the University, prior to the stated ending date of appointment for serious misconduct, serious dereliction of academic duty, or the failure to maintain the academic standards.
- c. Any discipline or dismissal pursuant to this Article shall be for just cause.

## 2. Notice of Intent

The University shall provide Written Notice of Intent for the following actions: suspension without pay, reduction in pay, or dismissal.

### a. Issuance

The University shall give a Written Notice of Intent to the affected the PCS bargaining unit member, either by delivery in person, or by placing the Written Notice of Intent in the United States Mail, first-class, postage-paid, in an envelope addressed to the PCS bargaining unit member at her or his last known home address. The PCS bargaining unit member shall be responsible for informing the designated University office in writing of his or her current home address and of any change in such address. The information so provided shall constitute “the employee’s last known home address.”

The University will send a copy of the notice to the Union.

Whether the University delivers the Written Notice of Intent in person or by mail, the Notice of Intent shall contain a statement of delivery or mailing indicating the date on which the University personally delivered or deposited the Notice of Intent in the U.S. Mail. Such date of delivery or mailing shall constitute the date of issuance of the Written Notice of Intent.

### b. Content

The Written Notice of Intent shall:

- 1) inform the PCS bargaining unit member of the disciplinary or dismissal action intended, and the effective date of the action;
- 2) provide an explanation of the reason for the action,
- 3) inform the PCS bargaining unit member of the right to respond, to whom to respond, and the applicable time frame; and
- 4) inform the PCS bargaining unit member of the right to representation by a representative of her/his choice, including the union.

## 3. Response to Written Notice of Intent

The PCS bargaining unit member or her/his designated representative shall be entitled to respond, either orally or in writing, to the Notice of Intent described above. If the University delivers the written Notice of Intent in person, the University must receive the response within fourteen (14) calendar days from the date on which it delivered/issued the written Notice of Intent. If the University mails the written notice, the University must receive the response within thirty (30) calendar days from the date on which the written Notice of Intent was mailed. The University shall establish the date on which it mailed the Notice of Intent by sending the Notice via registered mail.



**Article 32 – Grievance Procedure**

The University proposes to keep the current contract language, provided grievances are limited to the provisions of the Agreement that apply to PCS and/or this Side Letter.

**Article 33 – Arbitration**

The University proposes to keep the current contract language, provided arbitrations are limited to the provisions of the Agreement that apply to PCS and/or this Side Letter.

**Article 37 – Waiver**

The University proposes to keep the current contract language, provided subjects are limited to the provisions of the Agreement that apply to PCS and/or this Side Letter.

**Article 41 – Parking**

The provisions in Article 41 shall apply to PCS bargaining unit members.

**D. PROVISIONS THAT DO NOT APPLY**

None of the articles below shall cover the Preuss Charter School bargaining unit members:

Article 7A - NSF Appointments

Article 7B - Process for Initial Continuing Appointments

Article 7C - Continuing Appointments

Article 23 – Summer Session

Article 29 – Academic Calendars

Article 31 – Pre Six Mentoring

Article 42 – On-Line Education

Appendix H – NSF List of Duties that Shall Receive Equivalencies  
IX Side Letters

Appendices

Appendix PCSSL: A – Salary Scale


Appendix PCSSL: B – Extended Day Pay

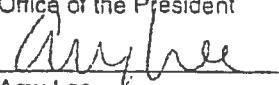
Appendix PCSSL: C – Enumeration of Benefits

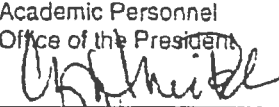
**E. IMPLEMENTATION**

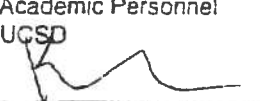
The parties agree to implement dues and agency fees provisions sixty (60) days following ratification of this Side Letter agreement, which occurred on August 11<sup>th</sup>.

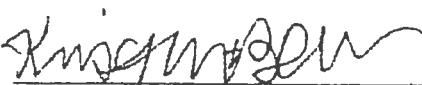
FOR THE UNIVERSITY

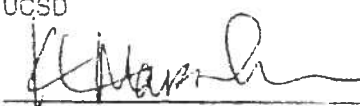
  
Nadine B. Fishel Date 21 Aug 17  
Chief Negotiator  
Office of the President

  
Amy Lee Date 8/31/17  
Academic Personnel  
Office of the President

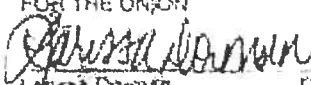
  
Cynthia Palmer Date 8.23.17  
Academic Personnel  
UCSD

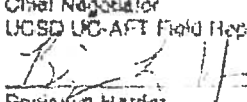
  
Kelly Lindlar Date 8/30/17  
Academic Personnel  
UCSD

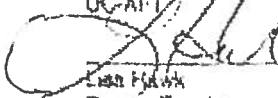
  
Kristin Beattie Date 8/22/17  
Labor Relations  
UCSD

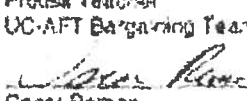
  
Karin Marsolais Date 8/23/17  
Preuss School

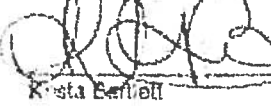
FOR THE UNION

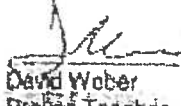
  
Leisha Dorman Date 8/21/17  
Chief Negotiator  
UCSD UC-AFT Field Representative

  
Benjamin Hauber Date 8/21/17  
Vice President  
UC-AFT

  
Lisa Hux Date 8/21/17  
Preuss Teacher  
UC-AFT Bargaining Team Member

  
Cesar Ramos Date 8/21/17  
Preuss Teacher  
UC-AFT Bargaining Team Member

  
Krista Bertell Date 8/21/17  
Preuss Teacher  
UC-AFT Bargaining Team Member

  
David Wober Date 8/22/17  
Preuss Teacher  
UC-AFT Bargaining Team Member

## PCSSL - Appendix A

	A	B	C	D	E
1	54,166	57,166	60,166	63,166	66,166
2	56,266	59,266	62,266	65,266	68,266
3	58,366	61,366	64,366	67,366	70,366
4	60,466	63,466	66,466	69,466	72,466
5	62,566	65,566	68,566	71,566	74,566
6	64,666	67,666	70,666	73,666	76,666
7	66,766	69,766	72,766	75,766	78,766
8	68,866	71,866	74,866	77,866	80,866
9	70,966	73,966	76,966	79,966	82,966
10	73,066	76,066	79,066	82,066	85,066
11	75,166	78,166	81,166	84,166	87,166
12	77,266	80,266	83,266	86,266	89,266
13	79,366	82,366	85,366	88,366	91,366
14	81,466	84,466	87,466	90,466	93,466
15	83,566	86,566	89,566	92,566	95,566
16	85,666	88,666	91,666	94,666	97,666
17	87,766	90,766	93,766	96,766	99,766

## PCSSL APPENDIX B – Preuss EXTENDED DAY PAY ASSIGNMENTS

1. **Overview:** This schedule outlines all current opportunities for extended day pay (EDP). Extended day pay assignments are work unrelated to regularly-assigned instructional duties and these assignments must advance the mission of Preuss. EDP assignments are work that must take place outside of a PCS bargaining unit member's normal work period and/or work that must be completed during the PCS bargaining unit member's prep period. The determination of all issues related to extended day pay duties and assignments are at the sole, non-grievable discretion of the University.
2. **EDP Committee:** A committee consisting of the Principal (or his non-represented designee) and the Preuss CAO will make all EDP assignment decisions and propose new EDP assignments or changes to existing EDP assignments, in consultation with and subject to final approval of Academic Personnel Services. EDP assignments will be determined by May 1<sup>st</sup> of each year, when practicable.

At least thirty (30) calendar days prior to Preuss' implementation of changes to EDP assignments, the University shall provide written notice to the Union of its intent to make such changes. The parties shall meet and discuss upon request of the Union, but this process shall not delay the implementation of changes to this Appendix.

3. **EDP assignment terms and application process:**

Applications, (where applicable), for EDP assignments will be accepted during the month of March. The assignments will last a minimum of one year and a maximum of three years, contingent upon reappointment/renewal of the contract. If the PCS bargaining unit member is not reappointed or if the PCS bargaining unit member's contract is not renewed, the assignment will automatically discontinue at the end of the PCS bargaining unit member's appointment. Under no circumstances will the assignment exceed the PCS bargaining unit member's contract length.

A reappointed PCS bargaining unit member may hold an EDP assignment for no more than two consecutive terms per assignment. The EDP Committee may recommend to the Associate Vice Chancellor for Academic Affairs that exceptions be made to this limit. PCS bargaining unit members interested in retaining an EDP assignment for an additional term will need to reapply after their contract is renewed. Assignments will be decided by the EDP Committee after their review of applications. Interviews may also be part of the selection process. Generally, an individual PCS bargaining unit member may not hold more than one EDP assignment at a time, subject to exceptions noted below, and exceptions proposed by the EDP Committee and approved by Academic Personnel.

4. **EDP payments:**

Payments will be processed according to the following schedule:

- a. Coaching assignments: In the pay period following completion of the respective season.
- b. Saturday Enrichment Academy, Special Events, and Unexpected Class Coverage: In the pay period following the completion of the assignment.
- c. All other activities: In the final pay period of the contract school year.

5. **Effective dates:**

This Appendix will be effective according to the following schedule:

- a. Assignments and Compensation: All changes will be effective school year 2018-19 in accordance with this Appendix. Application submissions will take place in March 2018.
- b. Vacancies: Any vacancy filled following ratification of the Side Letter shall follow the processes set out in this Appendix, with the exception of compensation (effective 2018-2019).

## PCSSL APPENDIX B – Preuss EXTENDED DAY PAY ASSIGNMENTS

Assignment	Compensation	Notes
6 <sup>th</sup> Grade Camp Coordinator	\$500 per year	May hold other EDP assignments.
After School Tutoring	\$50 per session, \$1,500 maximum per year	Applications not required, and may hold other EDP assignments. Tutoring sessions must be pre-approved and on record with Principal. Attendance sheets required.
AP Exam Preparation	\$200 per course, per year	Applications not required, only AP teachers can hold this assignment. May hold other EDP assignments. Attendance sheets required.
Art Production Advisor	\$1,500 per year	
ASB High School Advisor	\$2,000 per year	
ASB Middle School Advisor	\$2,000 per year	
Athletic Director	\$3,000 per year	
Botball Advisor	\$500 per year	May hold other EDP assignments.
BTSA Supervision	\$1,000 per year, plus \$250 for every teacher above 4 teachers	Annual reporting to Principal required.
Cheerleader Advisor	\$1,000 per year	
Chelsea's Light Advisor	\$1,000 per year	
Club Advisor (Academic Clubs) <i>Model U.N., National Honor Society, NOBCCChE</i>	\$500 per year	May hold other EDP assignments.
Coach (Varsity -- Athletic Block or Walk-on Varsity) <i>Basketball, Cross-Country, Lacrosse, Soccer, Volleyball</i>	\$3,000 per season	
Coach (Varsity -- Non-Athletic Block) <i>Basketball, Cross-Country, Lacrosse, Soccer, Volleyball</i>	\$5,500 per season	
Coach (Junior Varsity) <i>Basketball, Cross-Country, Lacrosse, Soccer, Volleyball</i>	\$1,000 per season	
Department Chair <i>E &amp; HS, Science, English, Social Studies, Math, World Language, Fine Arts, Electives, Learning Specialist</i>	\$2,000 per year	Duties as determined by Preuss; duties will include participation in the performance evaluation of departmental staff. ----- Department Chairs who are assigned supervision of intern teachers will be paid \$250 per year, per intern in addition to their Chair compensation.
Departmental Rep <i>ASB, Librarian, Student Services, University Prep (Advisory), 6<sup>th</sup> Grade</i>	\$1,500 per year	

## PCSSL APPENDIX B – Preuss EXTENDED DAY PAY ASSIGNMENTS

Assignment	Compensation	Notes
Drama Production Advisor	\$1,500 per year	
Music Production Advisor	\$1,500 per year	
Newspaper Advisor	\$1,500 per year	
Overnight Camp Supervision	\$200 per overnight	Applications not required, and may hold other EDP assignments. Prior approval from Principal required.
Robotics Advisors (x2)	\$2,500 per year	
Saturday Enrichment Academy	\$150 per session	May hold other EDP assignments. Attendance sheets required.
Saturday Enrichment Coordinator	\$500 per year	May hold other EDP assignments.
Science Fair Advisor	\$500 per year	Applications not required, and may hold other EDP assignments. Attendance sheets required for verification.
Science Olympiad Advisor	\$500 per year	May hold other EDP assignments.
Senior Advisory Teacher	\$500 per year	Applications not required, and may hold other EDP assignments.
Special Events <i>New Student Orientation, College Kick-off, Parent Academy, Parent Meeting, Financial Aid Workshop, Junior Class Mock Interviews, Enrollment Day</i>	\$75 per event	Applications not required, and may hold other EDP assignments.
Tech & Innovation Coordinator	\$1,000 per year	
Unexpected Class Coverage	\$50 per class	Applications not required, and may hold other EDP assignments. One time assignments for unplanned/emergency leave, requested by administration.
Yearbook Advisor	\$1,500 per year	

**PCSSL - APPENDIX C  
ENUMERATION OF UNIVERSITY BENEFITS**

**A. LISTING OF BENEFITS**

The following is a brief listing of current benefits provided to University employees. More information can be found in general University benefits publications and individual summary plan descriptions. Specific eligibility and benefits under each plan are governed entirely by the terms of the applicable plan documents, custodial agreement, University of California Group Insurance Regulations, group insurance contracts, and state and federal laws. Employees in an ineligible class are excluded from coverage regardless of appointment percent and average regular paid time. For details on specific eligibility of each health and welfare program, see the Group Insurance Regulations. These benefits and amounts may be subject to change based on the renewal of this insurance annually by the University.

**B. HEALTH BENEFITS**

**1. Medical Program**

A variety of (e.g., Health Maintenance Organization (HMO), Preferred Provider Organizations (PPO), etc.) plans are available to cover eligible employees and their eligible dependents. Choice of plans may vary from location to location.

**2. Dental Program**

Dental plans are available to cover eligible employees and their eligible dependents.

**3. Vision Program**

A comprehensive vision care benefit is available to employees who qualify based on their appointment and their eligible dependents.

**C. UNIVERSITY OF CALIFORNIA RETIREMENT SYSTEM (UCRP)**

UCRP is a defined benefit plan for which participation is mandatory for eligible employees, as determined by the type, percentage and duration of their appointments. Generally, a UCRP-eligible appointment is an appointment at 50 percent time for a year or more.

A prospectively expanded UCRP membership is applicable to certain lecturers using a 50 percent time worked eligibility standard tied to the academic year (9 months). The expanded UCRP eligibility criteria would result in treating lecturers who work 750 hours (750 hours is equivalent to 50 percent of 9 months) during a 12-month period in an equivalent manner as employees who work 1,000 hours (1,000 hours is equivalent to 50 percent of 12 months).

UCRP provides retirement income, adjusted for cost-of-living increases, for eligible employees, and their contingent annuitants. UCRP also provides pre-retirement

**PCSSL - APPENDIX C  
ENUMERATION OF UNIVERSITY BENEFITS**

disability income for eligible employees and, pre-retirement survivor income for their eligible survivors. Also, for eligible employees who became UCRP members prior to July 1, 2013 and have not incurred a break in service, UCRP provides post-retirement survivor income to eligible survivors and a lump sum cash out option for members in lieu of monthly retirement income (provided the member elected this option).

**D. Voluntary University of California Retirement Savings Program (UCRSP)**

1. Tax-Deferred 403(b) Plan

Participation through voluntary pretax salary deferrals

2. 457(b) Deferred Compensation Plan

Participation through voluntary pretax salary deferrals.

3. Defined Contribution Plan (DC Plan)

Participation through voluntary after-tax contributions or for non-career employees, a mandatory pretax contribution of 7.5% of earnings up to the Social Security wage base in lieu of Social Security (safe harbor contributions).

All University employees except students who normally work fewer than 20 hours per week are eligible to participate in the UCRSP.

The plans offer a variety of investment options to meet the diverse needs of different types of investors and to allow for individual decisions to meet a variety of long-term financial goals.

**E. LIFE INSURANCE**

1. Life Insurance Program

a. Basic/Core (University-Paid)

Employees who are members of a defined benefit plan to which the University contributes are automatically covered by Basic term life Insurance policy.

b. Supplemental and Dependent (Employee-Paid)

Additional life insurance is available to employees who qualify based on their appointment. Optional personal life insurance and dependent life insurance may be purchased by the employee.

**F. OTHER INSURANCE**

1. Accidental Death & Dismemberment Insurance (AD&D)



**PCSSL - APPENDIX C  
ENUMERATION OF UNIVERSITY BENEFITS**

UC offers the AD&D plan to help protect employees and their eligible family members from the unforeseen financial hardship of a serious accident that causes death or dismemberment. Employees who qualify based on their appointment may purchase Optional AD&D insurance. A variety of coverage and amounts of coverage are available.

**2. Business Travel Accident Insurance**

Employees who are traveling on official University business are covered by the University's travel insurance program that provides Accidental Death benefit of the lesser of 10 times annual salary or \$500,000 and Dismemberment benefit based on a scheduled percent of benefit.

**3. Disability Insurance**

**a. Short-Term Disability (University-Paid)**

Employees who are members of a defined benefit plan to which the University contributes are automatically covered by a basic short-term disability plan.

**b. Supplemental (Employee-Paid) Additional disability insurance** which covers both short – and long-term disabilities may be purchased by employees who are members of a defined benefit plan to which the University contributes. Employees may choose a waiting period.

**4. Legal Expense Insurance Plan**

A legal expense insurance plan is available to employees who qualify based on their appointment. The legal plan provides employees and their eligible dependents with coverage for basic legal services associated with preventive, domestic, consumer and defensive legal matters.

**5. Auto/Homeowner Insurance**

Auto and home insurance policies are available which may be purchased by employees who qualify based on their appointment.

**6. Family Care Referral Service**

A resource for finding childcare, eldercare, and other family care providers is available to employees who qualify based on their appointment.

**G. OTHER BENEFITS**

**1. Tax Savings on Insurance Premiums (TIP)**

**PCSSL - APPENDIX C**  
**ENUMERATION OF UNIVERSITY BENEFITS**

Employees enrolled in certain health insurance plans are automatically enrolled in TIP, unless the employee makes an election to withdraw. After the University contribution, if any, is applied the net insurance premiums are deducted on a pre-tax, salary reduction basis.

2. Flexible Spending Accounts

a. Dependent Care Flexible Spending Account (Depcare FSA)  
DepCare is available to employees who qualify based on their appointment and allows employees to pay for eligible dependent care expenses on a pretax, salary reduction basis.

b. Health Flexible Spending Account (Health FSA)

The Health FSA is available to employees who qualify based on their appointment and allows employees to pay for eligible out-of-pocket health care expenses on a pretax, salary reduction basis.

c. Pretax Transportation Program

Federal and State tax laws make it possible for the University to offer eligible employees who pay for parking, transit passes or vanpooling by payroll deductions to do so on a pretax basis, subject to certain limits. Eligibility varies according to UC location.

3. **Death Payments** — upon the death of an employee who has been on pay status at least fifty percent (50%) time at least six (6) continuous months prior to death a sum equal to the deceased's regular salary for one month shall be paid to the deceased's spouse, or if there is no spouse, to the employee's eligible dependent(s), or if there is neither a surviving spouse nor eligible dependent(s), to the beneficiary designated in the deceased's Basic life insurance policy.

There is a \$7,500 lump sum death benefit payable to beneficiaries of deceased UCRP members. All monies due and payable to the employee at the time of death shall be paid to the employee's surviving spouse and/or eligible dependent(s).