

**MEMORANDUM OF UNDERSTANDING BETWEEN  
PETALUMA CITY (ELEMENTARY) AND JOINT UNION HIGH SCHOOL DISTRICTS  
AND  
PETALUMA FEDERATION OF TEACHERS**

The Petaluma City Schools District ("District") and The Petaluma Federation of Teachers ("PFT") agree to the following Revised Memorandum of Understanding ("MOU") dated **February 5, 2020**:

The parties agree to offer a revised Retirement Incentive for PFT Unit Members. The District will **not** consider another retirement incentive until after the expiration date of the current contract (2019-22). Below are the components, requirements, and guidelines for the Proposed Retirement Incentive Plan:

**Eligibility requirements – PFT Bargaining Unit Members must be:**

- At least 58 years of age on or before June 30, 2020.
- First day of permanent service (Date of Hire) with Petaluma City Schools on or before October 15, 2004.
- Full Incentive is based on a 1.0 FTE (Maximum) and is prorated for less than a 1.0 FTE.
- Eligible employees must retire from STRS/PERS no later than August 31, 2020.

A **one-time** cash incentive to be paid by June 30, 2020 through payroll with applicable taxes withheld as follows:

- \$15,000 (if 14-19 unit members retire), or
- \$20,000 (if 20 or more unit members retire)

**30 Year Bonus Incentive for either Option A or B participants:** For unit members who have 30 or more years of service with Petaluma City Schools, an additional \$3,000 cash incentive will be provided if the retirement incentive is implemented.

**Additional Requirements:**

- Unit members desiring to participate in the program must submit their letters of intent to retire under this program no later than 4:30 pm on February 18, 2020. If the conditions are met and the Superintendent or his/her designee accepts the retirement letter, the retirement is irrevocable. Only members who provide their intent during this window will be eligible to participate.
- In order to implement the plan at the levels indicated above, the district needs a minimum of 15 eligible PFT unit members retiring to receive \$15,000 or 20 eligible PFT unit members retiring to receive \$20,000. The minimum is required to be able to show a cost savings with the retirement pool.

**Note:** This agreement is subject to Board approval and is non-precedent setting. The District will **not** consider another retirement incentive until after 2021-22.

**Petaluma City Schools / PFT-Intent to Retirement Memo**

If you are eligible and want to apply for this Revised Retirement Incentive Plan (2/5/2020), please fill out the form below and return to the Human Resources Office no later than 4:30pm on February 18, 2020.

Name: \_\_\_\_\_ Current Site: \_\_\_\_\_

**Declaration:** I hereby apply for the retirement incentive as stated above. I have read and understand the requirements and restrictions. If the incentive is finalized, I will retire on the following date. I understand that I may withdraw my retirement letter if the District does not offer the retirement incentive:

\_\_\_\_\_  
Date of retirement

\_\_\_\_\_  
Signature

For Petaluma School District


  
Matthew Harris, Assistant Superintendent,  
Human Resources

February 5, 2020  
Date

  
Chris Thomas, CBO

2/5/2020  
Date

For Petaluma Federation of Teachers

  
Sandra Larsen, President

2/5/2020  
Date

  
Doug Cox, Chief Negotiator

2/5/2020  
Date