

Instructions for CalPERS 180-Day Wait Period Exception School Employers per G.C. section 7522.56

Bona Fide Separation in Service: If a member retires/will retire prior to his or her oldest benefit formula age, or the maximum normal retirement age of 62 (age 55 for 2% @ 55 formula, age 60 for 2% @ 60 formula, etc.), you cannot have an agreement, written or verbal, for post-retirement employment *before* the member retires. This bona fide separation in service requirement is federal tax law and must be met before you obtain a 180-day wait period exception. For details, see “Employment of a Retiree” in the Public Agency & Schools Reference Guide at this link: <https://www.calpers.ca.gov/docs/forms-publications/pas-ref-guide.pdf>

Attached are two sample resolutions for school employers to use for approving a 180-day wait period exception. **The County Office of Education or Board of Education is the governing body which must pass this resolution, not the governing body of the school district.** The required documents should be submitted to CalPERS before the retiree begins working to ensure the exception is valid and the employment compliant.

The resolution for **G.C. sections 7522.56 & 21229** is for extra help retired annuitants, i.e., CalPERS retirees hired to perform work of limited duration, such as elimination of a backlog, special project work, or to perform work in excess of what regular staff can do. Appoint retirees to retired annuitant designated positions only. A retiree must reinstate from retirement to be employed in any regular staff position including permanent part-time, “permanent intermittent,” “seasonal,” “limited term,” “exempt from membership,” or any other type of “temporary” or periodic regular staff position.

The resolution for **G.C. sections 7522.56 & 21221(h)** is for a vacant position retired annuitant, i.e., a CalPERS retiree hired to work in a vacant position while you recruit for a permanent replacement. Use this resolution to appoint a retiree to positions such as an interim superintendent, interim department head and to any other unique managerial or executive position. An open recruitment to fill the vacancy with a permanent replacement is required in order to appoint a retiree. A retiree can only be appointed once to a vacant position. A retiree must reinstate from retirement (terminate retirement) to be employed as a permanent part-time or any other type of regular staff employee.

Submit the following documents to CalPERS before the employment begins:

- 1) Executed and signed resolution
- 2) Copy of the employment agreement or personnel appointment paperwork
- 3) Copy of the publicly available salary schedule listing the comparable or vacant position
- 4) Recruitment status for a vacant position section 21221(h) appointment— including a copy of, or web link to the activated recruitment

Email the documents to Working_After_Retirement@calpers.ca.gov for the fastest response. In the subject line state: **180-day exception (name of agency), (name of retiree), (retiree’s CalPERS ID)**

The documents can be faxed to **(916) 795-4166** or mailed to:

CalPERS
Membership & Post-Retirement Employment
Employer Account Management Division
PO Box 942709
Sacramento, CA 94229-2709

Resolution Number
Date of Resolution

County Office of Education
RESOLUTION FOR 180-DAY WAIT PERIOD EXCEPTION
G.C. sections 7522.56 & 21229

WHEREAS, in compliance with Government Code section 7522.56 the (governing body name) must provide CalPERS this certification resolution when hiring a retiree before 180 days has passed since his or her retirement date; and

WHEREAS, (retiree name, CalPERS ID or last 4 digits of the social security number) retired from (employer from which retired) in the position of (name of position from which retired), effective (CalPERS retirement date); and

WHEREAS, section 7522.56 requires that post-retirement employment commence no earlier than 180 days after the retirement date, which is (date of 181st day after retirement) without this certification resolution; and

WHEREAS, section 7522.56 provides that this exception to the 180-day wait period shall not apply if the retiree accepts any retirement-related incentive; and

WHEREAS, the (governing body name), the (school district name) and (retiree name) certify that (retiree name) has not and will not receive a Golden Handshake or any other retirement-related incentive; and

WHEREAS, the (governing body name) hereby appoints (retiree name) as an extra help retired annuitant to perform the duties of the (position name) for the (school district name) under Government Code section 21229 effective (date of appointment); and

WHEREAS, no matters, issues, terms or conditions related to this employment and appointment have been or will be placed on a consent calendar; and

WHEREAS, the employment shall be limited to 960 hours per fiscal year for all CalPERS employers; and

WHEREAS, the compensation paid to retirees cannot be less than the minimum nor exceed the maximum monthly base salary paid to other employees performing comparable duties, divided by 173.333 to equal the hourly rate; and

WHEREAS, the maximum base salary for this position is (monthly salary) and the hourly equivalent is (hourly rate), and the minimum base salary for this position is (monthly salary) and the hourly equivalent is (hourly rate); and

WHEREAS, the hourly rate paid to (retiree name) will be (hourly rate); and

WHEREAS, (retiree name) has not and will not receive any other benefit, incentive, compensation in lieu of benefit or other form of compensation in addition to this hourly pay rate; and

THEREFORE, BE IT RESOLVED THAT the (governing body name) hereby certifies the nature of the appointment of (retiree name) as described herein and detailed in the attached employment agreement/contract/appointment document and that this appointment is necessary to fill the critically needed position of (position name) for the (school district name) by (date employment begins) because (describe the reasons and conditions that require this position be filled by the listed date).

(Signatures and other notations as per usual for resolution by governing body name including vote count)

SAMPLE

Resolution Number
Date of Resolution

County Office of Education
RESOLUTION FOR 180-DAY WAIT PERIOD EXCEPTION
G.C. sections 7522.56 & 21221(h)

WHEREAS, in compliance with Government Code section 7522.56 the (governing body name) must provide CalPERS this certification resolution when hiring a retiree before 180 days has passed since his or her retirement date; and

WHEREAS, (retiree name, CalPERS ID or last 4 digits of the social security number) retired from (employer from which retired) in the position of (name of position from which retired), effective (CalPERS retirement date); and

WHEREAS, section 7522.56 requires that post-retirement employment commence no earlier than 180 days after the retirement date, which is (date of 181st day after retirement) without this certification resolution; and

WHEREAS, section 7522.56 provides that this exception to the 180-day wait period shall not apply if the retiree accepts any retirement-related incentive; and

WHEREAS, the (governing body name), the (school district name) and (retiree name) certify that (retiree name) has not and will not receive a Golden Handshake or any other retirement-related incentive; and

WHEREAS, the (governing body name) hereby appoints (retiree name) as an interim appointment retired annuitant to the vacant position of (position name) for the (school district name) under Government Code section 21221(h), effective (date of appointment); and

WHEREAS, an appointment under Government Code section 21221(h) requires an active, publicly posted recruitment for a permanent replacement; and

WHEREAS, the current status of this recruitment is (describe status of the recruitment); and

WHEREAS, this section 21221(h) appointment shall only be made once and therefore will end on (termination date of appointment); and

WHEREAS, no matters, issues, terms or conditions related to this employment and appointment have been or will be placed on a consent calendar; and

WHEREAS, the employment shall be limited to 960 hours per fiscal year for all CalPERS employers; and

WHEREAS, the compensation paid to retirees cannot be less than the minimum nor exceed the maximum monthly base salary paid to other employees performing comparable duties, divided by 173.333 to equal the hourly rate; and

WHEREAS, the maximum base salary for this position is (monthly salary) and the hourly equivalent is (hourly rate), and the minimum base salary for this position is (monthly salary) and the hourly equivalent is (hourly rate); and

WHEREAS, the hourly rate paid to (retiree name) will be (hourly rate); and

WHEREAS, (retiree name) has not and will not receive any other benefit, incentive, compensation in lieu of benefit or other form of compensation in addition to this hourly pay rate; and

THEREFORE, BE IT RESOLVED THAT the (governing body name) hereby certifies the nature of the employment of (retiree name) as described herein and detailed in the attached employment agreement / contract / appointment document and that this appointment is necessary to fill the critically needed position of (position name) for the (school district name) by (date employment begins) because (describe the reasons and conditions that require this position be filled by the listed date).

(Signatures and other notations as per usual for resolution by governing body name including vote count)