



Santa Clara County Office of Education

Charles Weis, Ph.D.
County Superintendent of Schools

Informational Bulletin

For Santa Clara County Districts

District Business & Advisory Services

Nimrat Johal: Director- DBAS: 408-453-6599

Cathy McKim, Manager-DBAS: 408-453-6588

Bulletin: 12-073

Date: December 2, 2011

To: District Fiscal Directors and Direct Funded Charter School Directors

From: Cathy McKim

Re: STRS/PERS Retirement Submission for Direct Funded Charter Schools - **Update** -

The purpose of this bulletin is to notify you of important changes to the deadlines provided in Bulletin 12-064ⁱ California State Teachers Retirement (STRS) Submission¹, dated November 4th. The deadlines stated in the published bulletin have been delayed until further notice.

Background Information:

California State Teachers Retirement System (CALSTRS) has changed the reporting requirements for Direct Funded Charter Schools (Charter School) . This information has been communicated previously on several bulletins. ⁱⁱ Charter Schools must be assigned their own unique CALSTRS identification number (5 digits) and retirement data must be reported using this 5 digit number. The practice in Santa Clara County Office of Education (SCCOE) has been to blend the retirement data of the Charter School with that of the sponsoring district and report the blended data to CALSTRS. This practice is no longer allowable.

While California Education Code (EC) 47611.3ⁱⁱⁱ provides guidance on retirement reporting for Charter Schools, specifically the responsibility and authority for these requirements; we want to make sure that we have provided the support needed to successfully meet the changes required by STRS.

We have had several conversations with concerned Charter School representatives regarding the published deadlines, their training needs and the details of the charges that will be incurred. Under the leadership and guidance of our Chief Business Officer, Ken Shelton, we believe that it is important that we continue to dialog and address all concerns before moving forward.

To meet this goal, we have scheduled a workshop that will provide the information necessary to meet the new requirements for Charter School retirement reporting. Register for this workshop at <http://santaclara.k12oms.org/>

¹ http://www.sccoe.org/docs/DBASBulletins/12-064%20DBAS-Informational%20Bulletin-%20STRS%20and%20Charter%20Schools_0.2936975.pdf

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Title: Charter School Retirement Reporting Workshop

Date: January 25, 2012 **Time:** 1:00-3:0pm **Place:** Ridder Park Drive, San Jose Room

Suggested Attendees:

- Charter School personnel responsible for the reporting of payroll retirement information
- Charter School personnel responsible for the technical creation of the required data files
- Charter School personnel responsible for Budget approval for additional costs associated with this change
- District Fiscal Directors responsible for the Charter School oversight

Please share this information as deemed appropriate

ⁱ Bulletin 12-064 Nov 04, 2011 California State Teachers Retirement (STRS) Submission
ⁱⁱ Bulletin 12-018 July 22, 2011 Retirement Submission Deadlines for Fiscal Year 2011-12
Bulletin 11-065 June 28, 2011 Employer Directive 2010-03 Charter School Reporting (Sample Resolution)

ⁱⁱⁱ Per California Education Code (Ed Code) 47611.3 (a)At the request of a charter school, a school district or county office of education that is the chartering authority of a charter school shall create any reports required by the State Teachers' Retirement System and the Public Employees' Retirement System. The county superintendent of schools, employing agency, or school district that reports to those systems pursuant to Section 23004 of this code or Section 20221 of the Government Code shall submit the required reports on behalf of the charter school. The school district or county office of education may charge the charter school for the actual costs of the reporting services.

(b)As a condition of creating and submitting reports for the State Teachers' Retirement System and the Public Employees Retirement System, the school district or county office of education shall not require a charter school to purchase payroll processing services from the chartering authority. Information submitted on behalf of the charter school to the State Teachers' Retirement System, the Public Employees' Retirement System, or both, shall be in a format conforming to the requirements of those systems.