



District Business & Advisory Services

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

Bulletin: 14-037

Date: April 8, 2014

To: Charter School Administrators

From: Nghia Do, Advisor - DBAS

Re: Direct Funded Charter School Retirement Reporting
Agreement for FY 2014-15

Deadline: July 1, 2014

The purpose of this bulletin is to remind all Direct Funded Charter Schools to submit the attached agreement for Charter School Retirement Reporting Services and fees of \$1,800 for fiscal year 2014-15 to the Santa Clara County Office of Education (SCCOE) on or before July 1, 2014.

The agreement and the fees are required for all Direct Funded Charter Schools who offer retirement benefit to their employees through the California State Teachers Retirement System (STRS) and have the monthly retirement reporting to STRS processed by the SCCOE .

To participate in CalSTRS retirement programs, charter schools must meet the following criteria:

- Recognized as a public charter school by the California Department of Education
- Elect to participate in STRS and enroll eligible employees as STRS members
- Provide documentation to STRS via School District or County Office of Education (the School District or County Office of Education may charge the Charter School for the costs of the reporting services (Education Code 47611.3))

If a charter school elects to participate in STRS, the charter school is required to inform all applicants for positions within the charter school of the retirement system options for the employees of the Charter school. If a charter school chooses to make the STRS Retirement Plan available, all employees of the charter school who perform creditable service shall be entitled to have that service covered under that plan. Additionally, once a charter school elects to participate in STRS, all parts of the Teacher's Retirement Law apply (Education Code 47611)

Please distribute this information within your district, as appropriate.



SANTA CLARA COUNTY OFFICE OF EDUCATION
AGREEMENT FOR CHARTER SCHOOL RETIREMENT REPORTING SERVICES

This agreement is entered into this _____ day of _____, by and between the Santa Clara County Office of Education (SCCOE) and the _____ Charter School (Charter).

The SCCOE is required to submit to California State Teachers Retirement System (STRS), a uniform retirement data file for all School Districts and Charters within the County.

The Charter School has determined that there is a need to enter into this Agreement with the SCCOE for the services described herein:

It is mutually agreed by the parties as follows:

Services to be provided by the SCCOE

1. The SCCOE agrees to process STRS reporting for the Charter.
2. The SCCOE will serve as the contact agency in working with STRS in resolving problems and answering questions related to reporting and processing of retirement information.
3. The SCCOE will notify the Charter of retirement exceptions and recommendations of possible resolutions.
4. The SCCOE agrees to provide the Charter training (within Santa Clara County) and information necessary for completion of required reporting.
5. The Charter staff will be included in all workshops provided to School Districts for ongoing training and meetings related to STRS retirement.
6. The SCCOE will assist the Charter payroll representative in preparing appropriate entries for past reporting that was not processed prior to the effect date of this agreement.

Responsibilities of the Charter

1. The Charter agrees to provide files of the required retirement and payroll information necessary for timely completion and transmittal of STRS information.
2. The Charter agrees to provide all the payroll/retirement reporting file data and reports by the due dates established by the SCCOE to meet all retirement reporting schedules established by STRS.
3. The Charter shall maintain all payroll records for its employees and furnish the SCCOE a copy upon request.
4. The Charter will designate one of its employees to serve as the contact person between the Charter and the SCCOE for matters related to regular reporting and processing of retirement information.
5. The Charter shall submit to the SCCOE the full amount of the retirement contributions that include both the employer and employee amounts within two business days after the close of payroll

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SCCOE's Fee and Payment Thereof

1. The Charter agrees to pay the SCCOE for the services under this Agreement as follows:
 - \$1,800 per year to be paid upon signing and submission of this Agreement (On or before July 1st of every year).
 - Processing fee of \$125 for each retirement data file submitted that is not acceptable and has to be replaced and reprocessed. These fees shall be assessed monthly and are payable upon demand.
2. The Charter agrees to reimburse the SCCOE for any penalties and/or other levies assessed by STRS that were caused by acts of the Charter.

Duration of Agreement

The Agreement begins on _____ and will need to be renewed for each fiscal year beginning July 1 and ending June 30.

IN WITNESS THEREOF, the parties hereto have caused this Agreement to be executed by their duly authorized officers.

**DIRECTOR OF DISTRICT BUSINESS
AND ADVISORY SERVICES
SANTA CLARA COUNTY OFFICE OF EDUCATION**

CHARTER SCHOOL

Title: _____

Title: _____

Approved by the Charter Governing Board on

Date

Authorized Person for Submission of Retirement Files to the STRS Connect Portal:

Name: _____

Title: _____

E-Mail: _____

Phone: _____