

**ARTICLE 4-B  
UNIVERSITY BENEFITS RETIREMENT AND SAVINGS PLANS**

**A. GENERAL CONDITIONS**

1. Retirement and Savings Plans

The University maintains several retirement and savings plans for eligible University employees. As of September 1, 2006, such plans include but are not limited to the UC Retirement Plan (UCRP), Tax-Deferred 403(b) Plan, Defined Contribution Plan (DCP) and 457(b) Deferred Compensation Plan, which collectively constitute the University of California Retirement System (UCRS). The University may, at its option, amend and/or terminate the existing UCRS plans, to the extent permitted by law and consistent with the plan terms, and establish new retirement and/or savings plans for the UCRS. In the event the University makes such alterations, the changes will apply to employees eligible to participate in the UCRS plans within the unit in the same manner as they apply to eligible Safety employees at the University.

2. Effective with this Agreement and through 2008, the amount and timing of employee contributions, if any, to the UC Retirement Plan will be the same as those paid by Safety employees at the University.

It is anticipated that mandatory contributions to the UCRP will be restarted for Active Members in 2008 and that the amount of each Active Member's contribution to UCRP will be calculated by the same formula currently used to determine the mandatory contribution to the DCP that UCRP eligible employees have been making in lieu of contributions to the UCRP. When such contributions are made to the UCRP, contributions to the DCP will no longer be required. UCRP eligible employees will see no loss in take-home pay as a result of these changes.

3. Re-opener bargaining regarding changes to employee contributions beyond 2008, if any, will begin in March 2008, in accordance with Article 9 - Duration of Agreement.

4. In the event the current Memorandum of Understanding (MOU) expires, the parties agree that the terms of this Article 4-B - University Retirement and Savings Plans, preserve the status quo and will continue in full force and effect unless otherwise expressly modified by mutual agreement of both parties.

**B. EFFECT OF ABSENCES FROM WORK ON BENEFITS**

**1. Military Leave**

An eligible employee on military leave with pay for emergency National Guard duty or Military Reserve Training Leave shall receive those benefits related to employment that are granted in the University's Military Leave policy and its related documents (see Appendix D).

**2. Leaves Of Absence Without Pay**

- a. Approved leave without pay shall not be considered a break in service and, except as provided in Section B.2.c, below, shall not determine eligibility for benefits except that the regulations of the retirement systems determine the effects of such leave without pay on retirement benefits.
- b. Except as provided in Section B.2.c, below, an eligible employee on approved leave without pay may, in accordance with the benefit documents, rules and regulations, elect to continue University-sponsored benefits for the period of time specified in the benefit documents, rules and regulations.
- c. An employee on an approved Family Care and/or Medical Leave (FMLA) shall continue to be eligible for retirement benefits in accordance with the provisions of the applicable group insurance and retirement system regulations.

**C. ENUMERATION OF UNIVERSITY RETIREMENT AND SAVINGS PLANS**

For informational purposes only, a brief outline of retirement and savings plans in effect on the date the Agreement is signed is found in Appendix C. IAFF understands and agrees that the descriptions contained in Appendix C do not completely describe the coverage or eligibility requirements for each plan, the details of which have been independently communicated to IAFF.

Specific eligibility and benefits under each of the various plans are governed entirely by the terms of the applicable Plan Documents, custodial agreements, University of California Group Insurance Regulations, group insurance contracts, and state and federal laws. Employees in an ineligible classification are excluded from coverage, regardless of appointment percent and average regular paid time. For details on specific eligibility for each program, see the applicable documents, agreements, regulations, or contracts.

**D. REDUCED FEE ENROLLMENTS**

An employee who has retired within four (4) months of the date of separation from University service and who is an annuitant of a retirement system to which the University contributes, and who meets the admission requirements of the University, is eligible for two-thirds (2/3) reduction of both the University registration fee and the University educational fee as described below. An individual so registered is ineligible for the services and facilities of the counseling centers, gymnasias, or student health services, other than those to which the retired employee may be otherwise entitled.

1. For an employee on the quarter system, the reduced fee limit is nine (9) units or three (3) regular session University courses per quarter, whichever is greater.
2. For an employee on the semester system, the reduced fee limit is six (6) units or two (2) regular session University courses, whichever is greater.