

State of California

MEMORANDUM

To: PERSONNEL MANAGEMENT LIAISONS

Date: December 1, 1988  
Reference Code: 88-104

**THIS MEMORANDUM SHOULD BE IMMEDIATELY DISTRIBUTED TO:**

Labor Relations Officers  
Personnel Officers

From: Department of Personnel Administration  
Office of the Director

Subject: Employee Workshops on Retirement Planning

Legislation passed in 1988 made several changes in the Public Employees' Retirement System's (PERS') Second Tier retirement plan for State employees. The Department of Personnel Administration (DPA) recently trained personnel office staff on these changes and the General Election for eligible employees. These changes, which pertain to miscellaneous and industrial retirement categories only, should also be explained to your employees.

Staff from DPA will be conducting employee workshops at the times and locations throughout the state as indicated on the attachment. The workshops are designed to provide basic information on the recent changes and related general information concerning retirement planning.

Each workshop will last approximately two hours and filled on a first come, first served basis. Each session will be limited to 30 employees. Additional workshops may be held later if needed. All employees who have questions regarding these retirement program changes or would like to have additional general program information should be encouraged to attend. Departments are encouraged to provide paid time off for employees who wish to attend the workshops.

In order to make sure employees are aware of the workshops, please distribute copies of the attached material to eligible employees.

If you have any questions on our upcoming workshops, please contact Oscar Alarcon at (916) 324-0523, ATSS 454-0523.



Lillian Rowett  
Deputy Director

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State of California

MEMORANDUM

To: Employees in PERS Miscellaneous and  
Industrial Retirement Categories

Date: December 1, 1988

From: Department of Personnel Administration  
Office of the Director

Subject: Workshops for Retirement Planning

Recent legislation (Ch. 331, AB 1109) made several changes to the Public Employees' Retirement System's (PERS) Second Tier plan for State employees. These provisions permit employees who are miscellaneous and industrial members to change their retirement coverage. Specifically, between November 1, 1988 and October 31, 1989, an eligible Second Tier member may:

- Elect to become a First Tier member for past and future qualifying service, provided past contributions are repaid to PERS; or
- Elect to become a First Tier member for future qualifying service only and keep past service credit under the Second Tier plan.

During the same period, an eligible First Tier member may:

- Elect to become a Second Tier member for all past and future qualifying service; or
- Elect to become a Second Tier member for future qualifying service only and keep past service credit under the First Tier.

In addition, the current annual Second Tier election for eligible First and Second Tier members has been rescheduled to one held every five (5) years. The first will be held in November 1994, (five years after the one-time only, one year general election ending October 31, 1989).

In order to ensure that employees are provided with adequate information regarding these programs, the Department of Personnel Administration is scheduling a number of workshops throughout the state. If you have questions regarding these programs or need related general information to assist you in retirement planning, you should attend one of these workshops.

The workshops will be limited to available seating, at the locations noted on the schedule (see back), and will last no more than two hours. Additional workshops may be conducted before the General Election ends on October 31, 1989, if the need is present.

Your attendance at a workshop should be cleared with your supervisor through your usual procedures.



Lillian Rowett  
Deputy Director

## WORKSHOPS ON RETIREMENT PLANNING

- Bring a pencil or pen (and a calculator, if you own one).
- Attendance limited to seating available.
- A workshop will last about 1 1/2 hours.

<u>When</u>	<u>Time</u>	<u>Where</u>
January 4, 1989	9:00 a.m. & 1:00 p.m.	Board Room (Basement), Caltrans Building Room 1420, Caltrans Building 1120 N Street, Sacramento 95814
	9:00 a.m. & 1:00 p.m.	Room 133, Resources Building 1416 9th Street, Sacramento 95814
January 5, 1989	9:00 a.m.	Executive Dining Room, Second Floor, OB 9 744 P Street, Sacramento 95814
	1:00 p.m.	Room 1005, Franchise Tax Board Building 9645 Butterfield Way, Sacramento 95827
	1:00 p.m. & 3:00 p.m.	Executive Dining Conference, 3rd Floor, DMV 2415 First Avenue, Sacramento 95818
January 11, 1989	9:00 a.m. & 1:00 p.m.	Room 153, East Campus Administration Bldg., Agnews Developmental Center, 3500 Zanker Road, San Jose 95134
	9:00 a.m. & 1:00 p.m.	Kearny Mesa Operations Center, Caltrans Bldg., 7181 Opportunity Road, San Diego 92111
January 12, 1989	9:00 a.m. & 1:00 p.m.	Room 1157, State Building 350 McAllister Street, San Francisco 94102
	9:00 a.m. & 1:00 p.m.	Room 1101, State Building 107 South Broadway, Los Angeles 90012
January 13, 1989	10:00 a.m.	Chapel, Sonoma Developmental Center 15000 Arnold Drive, Eldridge, 95431
	2:00 p.m.	Training Auditorium, B Ward, Napa State Hosp., 2100 Napa-Vallejo Highway, Napa 94558-6293
	1:00 p.m. & 3:00 p.m.	Room 101 (Basement), Acute Hospital, Lanterman State Hospital 3530 West Pomona Boulevard, Pomona 91769
January 18, 1989	1:00 p.m. & 3:00 p.m.	Large Visiting Room, Atascadero State Hospital 10333 El Camino Real, Atascadero 93422
January 19, 1989	1:00 p.m. & 3:00 p.m.	Classroom 41, Administration Building Porterville State Hospital 26501 Avenue 140, Porterville 93258
	1:00 p.m. & 3:00 p.m.	Staff Development Classroom of R & T Building Fairview State Hospital 2501 Harbor Boulevard, Costa Mesa 92626
January 20, 1989	9:00 a.m. & 1:00 p.m.	Executive Dining Room, Room 217, OB 9 744 P Street, Sacramento 95814
January 24, 1989	9:00 a.m. & 1:00 p.m.	Room 58 & 59, Caltrans District Office 1656 Union Street, Eureka 95501
January 25, 1989	9:00 a.m. & 1:00 p.m.	Room 24 (Basement), Caltrans District Office 1657 Riverside Drive, Redding 96001