



The Helena Public Schools educate, engage, and empower each student to maximize his or her individual potential with the knowledge, skills and character essential to being a responsible citizen and life-long learner.

Board of Trustees Special Meeting

Lincoln Center
1325 Poplar St., Helena, MT, 59601
and via TEAMS

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February 16th, 2022 – 12:00p.m.

AGENDA

- I. CALL TO ORDER
- II. REVIEW OF AGENDA
- III. **GENERAL PUBLIC COMMENT:** *This is the time for comment on public matters that are not on the agenda. Public matters do not include any pending legal matters, private personnel issues or private student issues. Please do not attempt to address such issues at this time or you will be ruled out of order. The Board cannot enter into a discussion during General Public Comment.*
- IV. ITEMS FOR ACTION
 - A. Approval of the HEA Teacher Retirement Incentive.
- V. BOARD COMMENTS
- VI. ADJOURNMENT

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Board of Trustees

Approval of Teacher Retirement Incentive



IV. ITEMS FOR ACTION

A. Approval of the HEA Teacher Retirement Incentive.

Background:

The Helena Education Association and the Helena School District have reached a tentative agreement on a negotiated retirement incentive. Both the Helena Education Association and the Helena Board of Trustees has to formally accept the tentative agreement.

The following outlines the terms of the tentative agreement:

- 1) A retirement incentive will be offered for two (2) years: teachers retiring in June 2022, and June 2023.
- 2) Termination pay, in the amount of \$15,000 will be awarded to each eligible teacher and will be added to any and all other termination pay the teacher may be entitled to.
- 3) The incentive will be made available for up to thirty (30) teachers over the course of the two years. The incentives awarded per year will be in any combination of numbers up to the entire thirty (30) teachers.
- 4) The incentive will be awarded with the following restrictions:
 - Teacher must be at Step 20 or higher on either the PCAP or the Steps and Lanes Salary Matrix
 - Teacher must give notice, regardless of year of retirement, by February 25, 2022
 - Teacher must indicate which year they plan to retire (June 2022, or June 2023)
- 5) The incentive will be awarded in the following order:
 - Step on the salary matrix, including stipend—highest to lowest
 - Seniority in the Helena School District—highest to lowest
 - If two members are at the same step and seniority, the tie breaker will go to the member that has been at the higher salary for a longer period of time
 - All grandfathered teachers will be considered first
 - Grandfathered highest salary will then be considered
 - Seniority of those grandfathered will then be considered
 - Then, the same process will resume for those on Step 24
 - Then, the same process will resume for those on Step 23, Step 22, Step 21, and finally Step 21 until 30 teachers have received the incentive
 - Date and time of retirement notification
- 6) On February 28, 2022, the teachers who qualify for the incentive will be notified by the district of their status. At that time these teachers will have until March 4, 2022 at 12:00 noon to decide.
- 7) This incentive, in no way, is intended to replace the retirement benefit as written in Article 2, Section 9 of the current Collective Bargaining Agreement (2020-2023) and other Collective Bargaining Agreements beyond 2023. Rather this incentive is in addition to the 2.9 retirement benefit.

Considerations:

- This retirement incentive recognizes years of service to Helena Public Schools and provides an economic incentive for those who meet the criteria.
- This retirement incentive is approved by TRS.
- This incentive is supported economically by the District.

Superintendent recommendation:

Approve the HEA Teacher Retirement Incentive for the 2021-2022 and 2022-2023 school years.