

3422c – COVERED ADMINISTRATIVE ASSISTANT BENEFITS

The Wauwatosa School Board has established this policy regarding benefits for regularly employed administrative assistants.

Administrative Assistant Classifications

All regularly employed administrative assistants shall be classified in one of the following categories: Full-time 12-month, full-time 11-month, or full-time 10-month employees (collectively “full-time”), or part-time employees.

- Full-time 12-month employees are administrative assistants whose regular work schedule consists of forty (40) hours per week, 12 months per year;
- Full-time 11-month employees are administrative assistants who are scheduled to work 240 eight-hour days during the school year, including paid vacation and holidays;
- Full-time 10-month employees are administrative assistants who are scheduled to work 221 eight-hour days during the school year, including paid vacation and holidays;
- Part-time employees are those administrative assistants who are regularly scheduled to work fewer than forty hours per week at least nine and one-half (9½) months per year and more than 400 hours per year, excluding seasonal or select support-staff employees.

Childrearing Leave of Absence

In addition to any available leave under federal or state FMLA laws, all full-time administrative assistants who have been employed for a minimum of one (1) year prior to the request, may request an unpaid leave immediately following birth or placement of a child for adoption or foster care. Requests must be made in writing to the Director of Human Resources at least three (3) months prior to beginning of leave and must identify length of leave requested. No such leave will be granted more frequently than once every three (3) years or exceed one (1) calendar year. During non-FMLA unpaid childrearing leave, the District shall not contribute toward an administrative assistant’s insurance premiums or other fringe benefits. No extension will be granted unless there are highly unusual circumstances based on recommendation of Superintendent and discretion of Board. If granted, this leave shall run concurrent with FMLA leave under state and federal law.

Dental Insurance

Single or family group premium will be paid by the Board for all full-time administrative assistants. Benefits will be determined under the terms of the District’s current dental plan. Regular part-time employees may participate in the District’s dental plan, with premiums paid on a pro-rata basis.

The dental plan design and benefits may be modified at any time at the discretion of the Board.

Post-Employment Benefits

An administrative assistant may be eligible, after fifteen (15) years of full-time, continuous employment with the Wauwatosa School District, attainment of age fifty-five (55), and who retires, to receive benefits set forth herein. Employees desiring to do so shall notify the Superintendent in writing sixty (60) days prior to the anticipated effective retirement date.

A. Eligible Administrative Assistants With At Least 15 Years of Continuous, Full-Time Employment With The District

For those administrative assistants with at least fifteen (15) years, but fewer than twenty-five (25) years of continuous employment with the District and who retire, the District shall pay the health insurance premium in force at the date of retirement for the District program for a single or family plan, whichever was in effect prior to retirement. Payments of health insurance premiums for administrative assistants who retire under this provision shall continue until the administrative assistant attains Medicare eligibility, the administrative assistant's death or sixty (60) payments have been made by the District on behalf of the retiree, whichever comes first.

B. Eligible Administrative Assistants With 25 Or More Years of Continuous, Full-Time Employment With The District

For those administrative assistants who retire and have at least twenty-five (25) years of continuous full-time employment with the District, the District shall pay the health insurance premium in force at the date of retirement for the District program for a single or family plan, whichever was in effect prior to retirement. Payments of health insurance premiums for administrative assistants who retire under this provision shall continue until the administrative assistant attains Medicare eligibility, the administrative assistant's death or ninety-six (96) payments have been made by the District on behalf of the retiree, whichever comes first.

C. Eligible Administrative Assistants Who as of June 30, 2013, Had at Least 15 Years of Continuous, Full-Time Employment With the District and Had Attained Age Fifty-Five (55)

For those administrative assistants, under this policy, who met both the age and eligibility requirements under the 2010-2013 Agreement between the Wauwatosa School District and the Wauwatosa Educational Support Association (WESA), shall maintain the level of benefits under Article 17 of that Agreement as of July 1, 2013, but shall not be entitled to earn a higher level benefit under that contract provision for additional years of service beyond July 1, 2013. Such an employee may, however, elect to retire with the benefits outlined in paragraph B, above, should the employee's additional years of service qualify him/her for a higher benefit category.

D. All Administrative Assistants Receiving Post-Employment Benefit Under This Policy

Changes in law may create significant liability for District if the benefits outlined in this post-employment section of this policy (hereinafter "this section") result in

penalties, fees, or excise tax payments. Accordingly, notwithstanding anything in this policy to the contrary, if the District reasonably determines that one or more provisions of the benefits outlined in this section may subject the District to liability for any penalty, fee, or excise tax payment, or the potential for same, under any provision(s) of the Patient Protection and Affordable Care Act, the Health Care and Reconciliation Act, any regulations formulated pursuant to either such Act or otherwise, or any other relevant law, the District reserves the right to unilaterally modify the benefits outlined in this section to eliminate the potential liability for District. In the event the District unilaterally modifies one or more of the benefits in this section as a result of liability for any penalty, fee, or excise tax payment, or the potential for same, the District will (a) provide notice to the retired administrative assistant that it is modifying the benefit(s) pursuant to this paragraph; and (b) provide the retired administrative assistant with a cash payment or other benefit(s), as determined by the District, of approximately the same cost to the District. It is the District's stated intent that it will make a good faith effort to attempt to maintain the approximate value (based on the cost to the District) of the benefits provided for in this section in any unilateral modification(s) instituted pursuant to this paragraph.

Administrative assistants must give sixty days (60) notice of the intent to retire and receive benefits under this policy. The policy may be modified from time-to-time by the Board.

Limited Purpose Flexible Spending Account

The administrative assistant has the option to establish a limited purpose flexible spending account and to have dollars deducted from his/her paycheck on a pre-tax basis to pay for qualified dependent care expenses, in accordance with the terms of the District's limited purpose flexible spending plan.

Health Savings Account

The administrative assistant has the option to establish a health savings account and to have dollars deducted from his/her paycheck on a pre-tax basis to pay for qualified medical expenses, in accordance with the terms of the District's health savings account.

Funeral Leave

Up to five (5) days' leave will be granted for the funeral of parent, sibling, spouse, child, son-in-law, daughter-in-law or domestic partner of the administrative assistant. In addition, one (1) day per year will be allowed for other relatives not listed above. Days taken as funeral leave are charged to sick leave.

Group Life Insurance

Group life insurance is provided to full-time administrative assistants in multiples of \$1,000 to a maximum to the next even \$1,000 above the administrative assistant's basic wage or salary with a minimum coverage of \$10,000, at no cost and without a medical examination. The basic

wage or salary is the administrative assistant's earnings based on his/her regular work schedule, excluding any premium or overtime payments.

Administrative assistants may purchase additional insurance, up to the plan maximum, at no additional expense to the Board.

Upon retirement, a full-time administrative assistant who qualifies for post-retirement benefits with at least fifteen (15) years of continuous service, shall continue to receive a life insurance benefit equal to amount of coverage in force prior to his/her retirement. The retired administrative assistant's amount of life insurance will reduce to \$7,500 on the retiree's 65th birthday.

Health Insurance

Eligible administrative assistants choosing health insurance coverage may select between two plans:

- Base Plan: The Board will pay the cost of single or family plan coverage for all eligible administrative assistants. The Board's payment shall be pro-rated based on the percentage of the administrative assistant's full-time status.
- ACA Plan: An eligible administrative assistant may select either single or family plan coverage, and the Board's contribution toward such coverage shall be equivalent to the cost of the single premium minus \$94.00/month. The ACA plan's initial effective date will be October 1, 2016.

Benefits will be determined under the terms of the current health care plans.

The health care plan design and benefits may be modified at any time at the discretion of the Board.

Vision Insurance

The administrative assistant has the option to purchase vision insurance through payroll deduction in accordance with the terms of the District's group vision insurance plan.

Long-Term Disability Insurance

The Board will pay the cost of long-term disability income insurance for full-time administrative assistants with maximum monthly benefit of ninety percent (90%) of monthly salary up to the plan maximum.

Short-Term Disability Insurance

The administrative assistant has the option to purchase short-term disability income insurance through payroll deduction in accordance with the terms of the District's Group Short-Term Disability Insurance Plan.

Personal Leave

Up to one day of personal leave per school year with pay shall be granted. Requests to use personal leave must be approved by the administrative assistant's direct supervisor and the Director of Human Resources. Personal leave shall be taken only in increments of half days or full days and shall not be deducted from sick leave nor shall it be used for that purpose.

Retirement Fund

The Board will pay the required employer contribution to the Wisconsin Retirement System (WRS). The administrative assistant will pay an amount equal to one-half of all actuarially required contributions to WRS.

Sick Leave

Administrative assistants earn 1 sick day per month with a maximum annual accumulation based on the administrative assistant's classification as a 12-, 11-, or 10-month administrative assistant. Part-time administrative assistants' accumulation of sick leave is prorated based on the administrative assistant's regular work schedule. Sick days may be accumulated to one hundred (100) days for 12-month administrative assistants and eighty five (85) days for 10-month administrative assistants. Sick leave may be used for personal illness or to attend medical appointments. Up to one-half (1/2) of accumulated days or fifteen (15) days, whichever is less, may be used in case of illness of member's spouse, child, parent or domestic partner.

Sick leave benefits may be used in increments of one (1) hour or multiples thereof.

To the extent permitted by applicable law, use of sick days for leave which qualifies under state or federal FMLA provisions shall run concurrently with such FMLA leave.

Tuition

The District shall reimburse administrative assistants for tuition costs for courses related to present work assignments or for courses related to job advancement with the District. To be eligible for reimbursement, the administrative assistants must have prior approval of the Superintendent and submit to the Superintendent proof of satisfactory completion of any courses. Furthermore, to be eligible for reimbursement, the administrative assistant must earn a minimum grade of "B" or "P". The scholarship award amount is deducted. In selected circumstances, the Superintendent or his/her designee may waive the requirement that courses receive pre-authorization to qualify for tuition reimbursement.

If the administrative assistant receives tuition reimbursement pursuant to this policy and then voluntarily terminates employment with the District within three (3) years after receiving tuition reimbursement, the administrative assistant agrees to repay the District for tuition monies paid to the administrative assistant according to the following schedule:

- A. Within one year after the check date with which tuition reimbursement is paid: one hundred percent (100%) of all tuition monies paid to the administrative assistant;

- B. Within two years after the check date with which tuition reimbursement is paid: sixty-six percent (66%) of all tuition monies paid to the administrative assistant;
- C. Within three years after the check date with which tuition reimbursement is paid: thirty-three percent (33%) of all tuition monies paid to the administrative assistant.

Prior to receiving tuition reimbursement, the administrative assistant must enter into a contractual arrangement with the District, and the contract shall, at a minimum, contain the tuition reimbursement parameters outlined in this policy. The Board delegates to the District Administrator or his/her designee authority to draft and enter into this type of contract on behalf of the District.

Vacation Days

A. Vacation Entitlement

1. Full-time 12-Month Administrative Assistants Hired Prior to July 1, 1996

An administrative assistant hired prior to July 1, 1996 (except for part-time administrative assistants, and ten-month administrative assistants) shall be entitled to an annual paid vacation in accordance with the following schedule based on continuous length of service computed from the day of hire:

10 days after 1 year of service

15 days after 5 years of service

20 days after 10 years of service

25 days after 15 years of service

Those full-time administrative assistants earning more than 25 days of vacation based on years of service as of July 1, 2002, shall continue to be entitled to an annual paid vacation at that same annual rate, but shall not earn additional days beyond that amount.

2. Full-time 12-Month Administrative Assistants Hired on or After July 1, 1996

An administrative assistant hired on or after July 1, 1996 (except for part-time administrative assistants and ten-month administrative assistants) shall be entitled to an annual paid vacation in accordance with the following schedule based on continuous length of service computed from the day of hire:

10 days after 1 year of service

15 days after 5 years of service

20 days after 10 years of service

Any administrative assistant with less than one year of service at July 1 shall be entitled to an annual paid vacation in accordance with the above schedule, such annual vacation to be prorated based on continuous length of service computed from the date of hire.

3. Regular Full-Time 11-Month Administrative Assistants

An eleven-month administrative assistant shall be entitled to an annual paid vacation in accordance with the following schedule based on continuous length of service computed from the day of hire:

5 day after 1 year

8 days after 5 years

11 days after 7 years

12 days after 12 years

4. Regular Full-Time 10-Month Administrative Assistants

A ten-month administrative assistant shall be entitled to an annual paid vacation in accordance with the following schedule based on continuous length of service computed from the day of hire:

1 day after 1 year

2 days after 5 years

3 days after 7 years

4 days after 9 years

5 days after 11 years

6 days after 13 years

7 days after 15 years

B. Accrual Date

On July 1 of each year, a determination shall be made for each administrative assistant, in accordance with the schedule set forth in section A above, of the amount of vacation with pay to which he/she is entitled. In making such determinations, administrative assistants who complete their 5th or 12th year of service after July 1 in such calendar year will be entitled to take additional vacation time in such years after their anniversary date.

On July 1, any 12-month full-time administrative assistant who has completed six (6) months of employment is eligible for paid vacation of not less than five (5) days, plus

any additional days accrued beyond the six (6) month period. On July 1, any administrative assistant who has completed less than six (6) months of employment shall be eligible for five (5) days of paid vacation to be taken after their six (6) month anniversary date. This accrued vacation must be taken prior to the following June 30th.

C. Limitations on Use

Administrative assistants eligible for vacation, except those assigned to schools, may use earned vacation during the school year. Administrative assistants assigned to schools are expected to take their vacation when school is not in session, except that administrative assistants entitled to three (3) or more weeks of vacation time may request that up to two (2) weeks of their vacation time be scheduled for a period when school is in session, provided that such request is made prior to May 1 of the year for which it is requested. Such requests shall be directed to the principal/supervisor and, if approved, shall be forwarded to the Human Resources Director. Vacations will be scheduled by building/department.

Vacations are not cumulative and must be taken within the vacation year of July 1 through June 30 of the following year unless a written request is filed with the principal and/or designated director and approved by the Superintendent.

Vacations may be taken in increments of one-half day for a maximum of one week of an administrative assistant's vacation time in a year. Vacations may be taken in full-day increments for up to a maximum of two consecutive weeks.

Holidays

The District shall observe a total of ten (10) paid holidays for 11-month and 12-month full-time administrative assistants: January 1, the Friday preceding Easter, Memorial Day, July 4, Labor Day, Thanksgiving Day, the day following Thanksgiving Day and December 24, 25, and 31. Ten-month full-time administrative assistants shall receive nine (9) paid holidays: January 1, the Friday preceding Easter, Memorial Day, Labor Day, Thanksgiving Day, the day following Thanksgiving Day and December 24, 25, and 31.

In order to be eligible for holiday pay, an employee must work the employee's regularly scheduled workdays immediately preceding and following the holiday, unless the employee is on an excused absence with pay. Employees on an unpaid leave of absence shall not be eligible for holiday pay if the holiday falls during the absence period.

Full-time

For the purpose of this policy, a full-time administrative assistant is one who is regularly scheduled to work forty (40) hours per week during the employee's work year, whether the employee is a 10-, 11- or 12-month employee.

Benefits and Domestic Partners

Health, dental and vision insurance benefits are offered to domestic partners of employees of the Wauwatosa School District on the same basis as married couples. For the purposes of Wauwatosa's benefit policies, a "domestic partner" is defined as an individual who has signed

and filed a declaration of domestic partnership in the office of the register of deeds in the county in which he or she resides.

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