EARLY RETIREMENT INCENTIVE PROGRAM
IOWA BRAILLE AND SIGHT SAVING SCHOOL

**Action Requested:** Consider approval of the Iowa Braille and Sight Saving School early retirement incentive program outlined below.

**Executive Summary:**

At the August 5, 2010, Board of Regents meeting, the board approved seven recommendations (see Attachment A) regarding the future programs and services of the Iowa Braille School. Recommendation #6 states:

The Board of Regents shall continue to operate the Vinton campus for the following operations:

1. **Direct Services.** A facility will be needed for short-term programs for students, e.g., weekend, weeklong, summer, in this region of the state and some statewide student short-term services. The site will serve as the center for services such as consultation, assistive technology and low vision.

2. **Administrative Services.** The Vinton site will be used as the center for administrative services with the Statewide System for Vision Services. The site will continue to operate in partnership with AmeriCorps NCCC programs with lease revenue to be used to offset a substantial portion of the costs to operate the facility.

Goal #1 of the Statewide System for Vision Services 2010 – 2016 Strategic Plan states, “The Statewide System for Vision Services shall increase the availability and participation in intense services in regions of the state.

In order to address the above noted recommendation and strategic planning goal, Superintendent Clancy is proposing a early retirement incentive program (ERIP). Only professional and scientific and merit staff would be eligible to participate. The proposed ERIP would be a “window” program in which employees must apply between March 28 and April 29, 2011. A total of 20 merit and professional and scientific employees meet the above criteria. Of the 20 employees who meet this criteria, 8 are age 50 with 20 years of experience; 5 are age 50 with 30 years of experience; 3 are age 55 with 30 years of experience and 4 are age 57 with 20 years of experience. Through reallocation of the savings from the 2011 ERIP, the number of Teachers of the Visually Impaired, Orientation and Mobility Specialists, and Consultants will be increased to intensify educational services regionally.
Specifics of the proposed ERIP are outlined below.

**Eligibility:**

1. Iowa Braille School regular merit and professional and scientific employees (benefits eligible)
2. Be at least fifty (50) years of age by June 30, 2011, and
3. Must have a minimum of 20 years of service at an Iowa Board of Regents Institution by June 30, 2011.

**Proposed Benefits:**

1. Cash benefit equal to 25% of the employee’s FY 2011 budgeted salary.
2. Payment of accrued vacation.
3. Payment of accrued sick leave, not to exceed $2,000 in accordance with Iowa Code 70A.23 and AFSCME Collective Bargaining Agreement.
4. Health and Dental insurance incentive – The school will contribute an amount equivalent to the amount contributed by the Employer for an active employee in the same plan and the same coverage level for five years. After eligibility for Medicare, the school will continue to contribute the incentive at the retiree health and dental insurance rates for the balance (if any) of the 5-year period.
5. In the event of the death of the former employee, the school’s obligation to pay the cost of health and dental coverage will cease on the first day of the month following the date of death. The employee’s surviving spouse or dependent may elect to continue coverage as provided by law.

**Application requirements:**

Iowa Braille School employees who meet the eligibility requirements must apply for the ERIP between March 28, 2011 and April 29, 2011. No applications will be accepted after April 29, 2011. The decision to request such a benefit is voluntary and initiated by the employee. Employees who elect to participate will be provided 7 days to revoke their election.

**Commencement of early retirement:**

Employees must fully retire no later than June 30, 2011.

**Re-employment:**

Re-employment into a benefits eligible position during the participation period is not permitted. Such employment may be permitted after the participation period.
The proposed ERIP will be used as a tool to shape, redirect, and focus the work force at the Iowa Braille School. The proposed ERIP does not create a right for the employee. Each application will be reviewed on an individual basis and will be subject to the approval by the Superintendent. Acceptance of the application shall be considered as a voluntary resignation. The effective date cited by the applicant on the application form must have approval of the Superintendent.

The Iowa Braille School / Statewide System for Vision Services currently employs 96 people in permanent positions as Faculty, Professional and Scientific (P&S) staff, Merit staff, and Institutional Officials. There are 48 faculty, 36 merit staff, 7 P&S staff, and 5 Institutional Officials. Of the 36 current merit employees, 18 are eligible for the proposed ERIP. Of the 7 P&S employees, 2 are eligible.

With the implementation of the ERIP, annually, up to $300,000 will be reallocated into the further implementation of the new service delivery model. The five-year cumulative amount to be reinvested into the new model will be up to $1,506,695 with the actual amount dependent upon the number of staff taking advantage of this program.

The proposed 2011 ERIP is a positive tool that will allow for the continued development of the Statewide System for Vision Services, an efficient and effective method to provide appropriate educational services to Iowa’s children who are blind or visually impaired including those with additional disabilities. The programs and services continue to be a collaborative effort with contractual agreements among the Board of Regents, the Iowa Board of Education, the Iowa Department for the Blind, and the Area Education Agencies. The management team of the Statewide System for Vision Services continues to provide direction and guidance to the Statewide System for Vision Services. The flexibility to use resources differently will allow for the implementation to provide expanded and high quality services to children who are blind and visually impaired in Iowa.

**Background**

At the direction of the Board of Regents, Human Resources staff from the five institutions and Board Office staff developed principles for Early Retirement Incentive Programs (ERIP). The following principles were approved by the Board in November 2001.

1. Comply with governing law;

2. Be designed as a voluntary window incentive program requiring administrative approval and be distinguished from other retirement programs;

3. Be independently designed to allow each institution flexibility to meet its strategic goals and human resource needs;

4. Be advantageous to each institution’s programmatic, economic, and human resource perspective;
5. Offer economic benefits to employee participants;

6. Be evaluated periodically to assure that the program accomplishes its intended objective.

In March of 2002, the Board of Regents received a report from the Board Office and the institutions on Early Retirement Incentive Programs that stated new programs could be proposed when needed to meet institutional needs. The report also suggested that new early retirement programs might include limited time availability programs (window programs) that targeted a limited number of staff, categories of employment, and certain operating units and departments. Future plans were to be individualized per institutional needs.

In 2007 and in 2009 the Iowa Braille School received approval from the Board of Regents for ERIP programs which were then implemented. The programs were in conjunction with and aligned with strategic planning goals to restructure the services of the Iowa Braille School.
Excerpt from the BOARD OF REGENTS AGENDA ITEM 7
STATE OF IOWA AUGUST 5, 2010

LEGISLATIVE STUDY COMMITTEE REPORT ON RESIDENTIAL SERVICES ON THE CAMPUS OF THE IOWA BRAILLE AND SIGHT SAVING SCHOOL

**Actions Requested:** (1) Consider approval of the recommendations of the Board of Regents Study Committee on residential services and facility utilization at the Iowa Braille and Sight Saving School. (2) Direct the Board Office to submit the final report to the Legislative Council by August 31, 2010.

**Executive Summary:** The 2010 Iowa Legislature (HF 2531 (§97)) directed the Board of Regents to study the residential component of the Statewide System for Vision Services. “The state Board of Regents shall conduct a study to examine possible changes to and make recommendations regarding the current structure for providing residential services on the campus of the Iowa Braille and Sight Saving School and to make recommendations regarding appropriate facilities and facility utilization. The study shall also examine potential partnerships with other state agencies as well as private providers of residential services.” The Board of Regents must submit a report of the study to the legislative council by August 31, 2010.

The Board of Regents appointed a study committee (Attachment A - Membership) to undertake the study. The Study Committee met four times between May-July 2010 and received comments from the public at each meeting.

The Study Committee proposed seven recommendations which reflect the need for continuous improvements at educational institutions. Maintaining the status quo at the Iowa Braille and Sight Saving School no longer meets the needs of the majority of Iowa students who are blind or visually impaired. It limits the intensity of services available throughout the state, leaves student needs unmet, and requires more restrictive placements to access needed services. Implementing the following recommendations will require current or increased resources and will allow provision of additional needed services closer to students’ residences.

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The interrelationship of the following recommendations requires their review and consideration as a set and not as individual stand alone recommendations.

**Recommendation 1** - The Iowa Legislature shall continue to appropriate fiscal resources at or above the current level.
Recommendation 2 - The Statewide System for Vision Services shall provide educational services as near to each student’s home as possible.

Recommendation 3 - The Statewide System for Vision Services shall strengthen the availability of intense services in each region of the state through the reallocation of residential costs using three mechanisms:

1. Employment of additional Teachers of the Visually Impaired, Orientation and Mobility Specialists, Special Education Consultants, and others, as appropriate.
2. Development and implementation of “Magnet” opportunities in partnership with other providers for the provision of regional intensive expanded core curriculum short-term programs.
3. Building capacity, expanding visibility, and increasing understanding of the Statewide System for Vision Services.

Recommendation 4 - The Statewide System for Vision Services shall develop and implement a process for determining and meeting the long-term residential needs of students who are blind or visually impaired.

Recommendation 5 - The Statewide System for Vision Services shall partner with other providers for the provision of long-term residential services for students with additional needs.

Recommendation 6 - The Board of Regents shall continue to operate the Vinton campus for the following operations:

1. Direct Services. A facility will be needed for short-term programs for students, e.g., weekend, weeklong, summer, in this region of the state and some statewide student short-term services. The site will serve as the center for services such as consultation, assistive technology and low vision. (Appendix B - Service Fact Sheet)
2. Administrative Services. The Vinton site will be used as the center for administrative services with the Statewide System for Vision Services. The site will continue to operate in partnership with AmeriCorps NCCC programs with lease revenue to be used to offset a substantial portion of the costs to operate the facility.

Recommendation 7 - The Board of Regents shall recommend to the legislature changing the name of the Statewide System for Vision Services and Iowa Braille and Sight Saving School to Iowa Educational Services for the Blind and Visually Impaired.