ATTACHMENT C

REVISED PILOT PROGRAM

Supplemental Pooling for the Health Benefits Cap

This Pilot Program is by and between the Lodi Unified School District and the California School Employees Association and its Chapter #77.

1. Employees who are married or domestic partners, as defined by California Law, are permitted to combine their District provided Health Benefit CAP to apply to one premium.
   a. This provision shall be subject to the terms and conditions of the CBA.
   b. Absent direction from the unit members, any payroll deduction shall be made from the spouse or domestic partner with the higher total annual income.
   c. The District will deduct from eight (8) Hour Employees subject to this provision, who apply their cap to their spouse or domestic partners Health benefit CAP, the amount needed to cover the cost of the mandatory Dental and Vision Plan.

2. The Association shall receive a pool of funds for active unit members on an annual basis as follows:

   a. First, the District will identify unused unrestricted funds budgeted for the Health Benefit CAPs (medical, dental and vision) of eligible FTE's in the previous school year. This data will be taken from the Unaudited Actuals which are typically approved by the Board at the first meeting in September.
   b. Next, a ten percent (10%) allowance will be deducted for unforeseen changes within the unit.
   c. Then, the ACA penalty paid by the District in the previous year will be deducted.

EXAMPLE	Pilot Program Description	Pilot Item #
$2,219,766.12	Prior Year Unused Unrestricted CAP Dollars	2.a
$221,976.61	10% Allowance for Unforeseen Changes	2.b
$168,956.08	ACA Penalty Paid in Previous Fiscal Year	2.c
$1,828,833.43	CSEA "Supplemental Pool" for Current Plan Year	2.d

   d. The sum of 2.a. through 2.c. above shall constitute the "Supplemental Pool" (2.d). The CSEA Negotiations Committee shall determine how to allot the Supplemental Pool to unit members eligible for a Health Benefit CAP:

      1) To supplement the Health Benefit CAP; and/or
      2) To provide unit members with in lieu money. To be eligible for in lieu money, a unit member must provide proper verification of medical insurance (e.g. ACA, Medicare or comparable coverage).

4. A unit member taking medical benefits cannot also take cash in lieu. CSEA must treat classes of similarly situated unit members the same (e.g. single, family, in lieu). A unit member who enrolls in dental and vision insurance shall not be excluded from in lieu money.

5. This process does not apply to retiree benefits.

6. Either Party may cancel this program for the following school year by providing written notice to the other not later than March 1st. Unless the Parties agree to extend this Revised Pilot Program, it shall sunset on December 31, 2024.