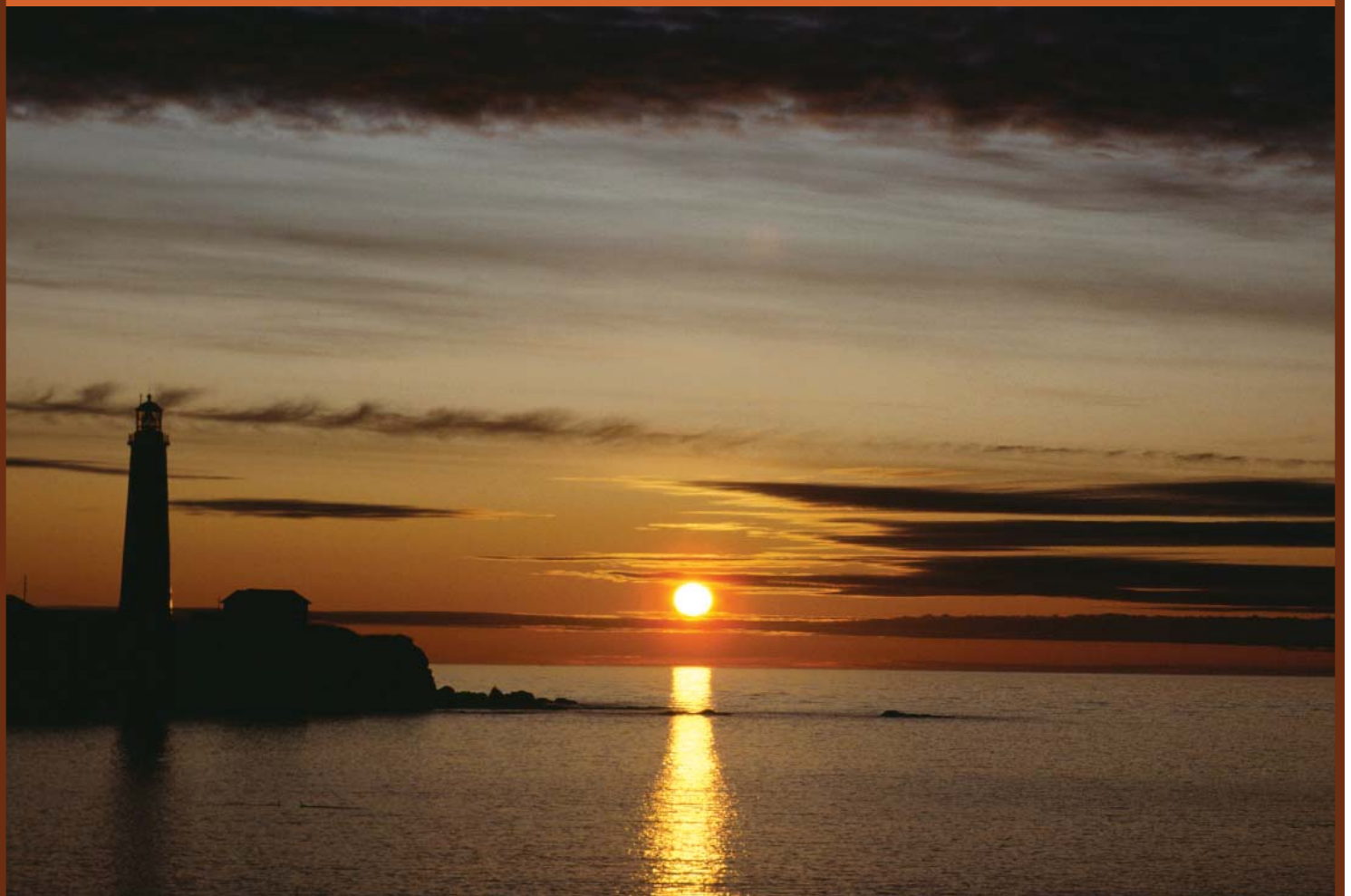




2009

Retirement Planning
GUIDE



REACH FURTHER.

Global competitiveness starts here.

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Please note:

The contents of this book are for informational purposes only and do not constitute advice regarding any person's retirement decisions. Each individual must make his/her own retirement decisions based on their own financial situation, health and other life issues. This publication is not an official publication of the Teachers' and State Employees' Retirement System. The information in this book is a compilation of information from the "Your Retirement Benefits" handbook which can be found on the Retirement System's official web site at www.nctreasurer.com and the North Carolina Public Schools Benefits and Employment Policy Manual which can be found on the North Carolina Department of Public Instruction web site at www.ncpublicschools.org/benemanual. If any information contained in this book differs from any official publication from the State, the official publication should be considered as governing information.



In compliance with federal law, Charlotte-Mecklenburg Schools administers all education programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

Retirement Eligibility Criteria

When Can I Retire?

The answer to this question depends upon your age and how many years of service you have in the Teachers' and State Employees' Retirement System (TSERS). When you choose to retire may also depend on whether you want to receive a reduced benefit, or your maximum benefit.

The retirement eligibility guidelines are listed below.

Retirement Eligibility - Unreduced

- Age 65 with at least 5 years of contributory service, **or**
- Age 60 with 25 years of service, **or**
- Any age with 30 years of service

Retirement Eligibility - Reduced

- Age 60 with at least 5 years of contributory service, **or**
- Age 50 with at least 20 years of service

You must meet one of the criteria above to retire. If you do not, you must wait to retire.

TSERS Retirement Options

Once you are eligible and decide to retire, you have several different options to choose from regarding your pension benefit. There are several factors to take into consideration in selecting which option is right for you. The following gives an explanation of the various options available.

Maximum Allowance

Single Life Annuity - You would receive the highest possible monthly benefit, the Maximum Benefit, for your lifetime. This does **not** allow for a benefit to a surviving spouse except the guaranteed return of your own contribution, if any remains at the time of death.

Option 2 - Sharing Your Retirement Benefit with a Spouse or other Beneficiary

100% Joint and Survivor Annuity - You may receive a lower monthly benefit during your lifetime in exchange for the opportunity of the same monthly benefit continuing to your surviving spouse/beneficiary after your death.

Option 3 - Sharing Your Retirement Benefit with a Spouse or other Beneficiary

50% Joint and Survivor Annuity - You may receive a slightly lower monthly benefit during your lifetime in

exchange for the opportunity of leaving your surviving spouse/beneficiary 50% of your monthly benefit upon your death. The monthly benefit you would receive during your lifetime would be less than the maximum benefit amount, but higher than the amount allowed under 100% Joint and Survivor annuity. *(Both Options 2 & 3 are actuarially calculated based on the age and gender of you and your beneficiary).*

Option 4 - Adjustment of Retirement Allowance and Social Security Benefits

Social Security Leveling - This is mostly used by individuals who are too young to receive Social Security benefits (younger than 62) and who are **not** planning to leave a monthly benefit to a survivor. With this option, you begin by receiving a monthly benefit that is a combination of what you would be entitled to under social security providing you were actually old enough to receive payments plus your monthly TSERS benefit. Once you reach age 62 and begin receiving social security early retirement benefits, your TSERS benefit is leveled off, so that the combination of your social security benefit and your lower TSERS benefit equals the same benefit you enjoyed prior to age 62. The only difference between benefits prior to and after age 62, is that prior to age 62 your total benefit would come from TSERS. After age 62, part of your benefit would come from TSERS and part from social security.

(Remember: To figure Option 4, you must include an estimate of your benefits as of age 62 from the Social Security Administration. Visit the SSA Website at: <http://www.ssa.gov> or, check the blue section of the white pages in your telephone directory to visit the nearest office).



Option 6-2 or 6-3 - Modified Joint and Survivorship

These are sometimes called “pop-ups.” Here’s why: Under both combinations, if your beneficiary should die before you do, your monthly benefit pops-up from a lower payment to the maximum payment. These options are especially popular with females, particularly if the husband is older. Statistically speaking, women live longer. This allows a female State retiree to share her benefit with her spouse in case she precedes him in death. However, if her husband were to precede her in death, she is not locked into a lower benefit for the rest of her life. Instead, her benefit would pop-up to the maximum benefit after his death.

6-2 is a combination of Option 2 (100% Joint and Survivor) and the Maximum Benefit. 6-3 is a combination of Option 3 (50% Joint and Survivor) and the Maximum Benefit.

None of these options are better than the other - it all depends on your individual situation as to which is best suited for your retirement.

Benefits Summary for Employees Who Are Retiring

Healthcare After Retirement

When you retire, you may be eligible for coverage under the State’s Comprehensive Major Medical Plan if you have at least five years of retirement membership service earned as a teacher or State employee. (Credit received for unused sick leave, or credit transferred from the Local Governmental Employees’ Retirement System does not count toward this 5-year requirement).

Under current law, if you were first hired prior to **10/1/06**, and retire with 5 or more years of State System membership service, the State will pay for your individual coverage under the regular State insured plan, either all or most of the cost if you select one of the Preferred Provider Organization (PPO) plans, depending on the plan chosen. Based on the conditions described above, if you were first hired on or after **10/1/06**, in order to receive individual coverage at no cost, you must retire with 20 or more years of retirement service credit; if you have 10 but less

than 20 years of retirement service credit, you will have to pay 50% of the cost for your coverage, and with 5 but less than 10 years, you will have to pay the full cost for your coverage. In all cases, the full cost of dependent coverage, if elected, must be paid by you.

At the time you complete your Application for Retirement, be sure to complete an application to enroll in the retired group of the State’s Medical Plan or PPO. The form required, Form HM - Selecting Health Coverage Through the State Health Plan can be found on the state retirement website **www.myncretirement.com**. Click on Retirement. Applications and forms is the second item on the drop down box. Go to All Forms by Form Number.

As a retiree, when you or covered dependents become eligible for Medicare, both Parts A and B must be elected in order to maintain the same level of coverage provided before retirement.

Dental and Vision Coverage

Coverage terminates the first day of the month following your last day worked regardless of your actual retirement date. You may elect to continue this coverage for up to 18 months under COBRA. Notification will be mailed to you by the COBRA administrator. You will receive a monthly bill at the premium rate in effect at the time you retire. You will also have the option to participate in the Retiree Dental and Vision Plans. Information regarding the Retiree Dental and Vision Plans will be mailed to you from State Insurance Services (SINSS). You should watch for this notification carefully since it is time sensitive and requires action on your part to enroll.

Life Insurance

Coverage terminates the first day of the month following your last day worked. You may convert your group coverage to an individual policy by making application within 31 days of your retirement date. Forms for application can be obtained from the CMS Benefits Web site. Conversion details may be obtained by calling the life insurance provider.

Longevity

If you are eligible for a longevity payment upon retirement, the Payroll Department will direct deposit the amount in your bank/credit union.

Sick Leave

There is no pay-out value for accumulated sick leave upon retirement. Sick leave can be counted as creditable service when retiring but cannot be used to meet the minimum qualification for a disability benefit or a

vested deferred retirement benefit. It can be used to complete 30 years of service, regardless of age; 25 years of service after age 60 and 20 years of service after age 50.

If you are overdrawn with respect to sick leave, a deduction in the appropriate amount will be made from your final paycheck.

Annual Leave

Upon retirement, you may receive a lump sum payment for accumulated annual leave not to exceed a maximum of 30 days. Anything over 30 days will convert to sick leave.

If upon retirement, you are overdrawn with respect to annual leave, a deduction in the appropriate amount will be made from your final paycheck. A deduction for retirement contributions will also be made from any lump sum payment for annual leave.

Flexible Benefits Plan

Dependent Care & Medical Reimbursement Plans

You do have the right to receive reimbursement for eligible expenses incurred within the plan year as long as you submit claims for reimbursement to the plan for services rendered before the retirement effective date. Contact Flex Corp at 1-888-505-4557 for details.

Disability & Cancer Policy Plans

You may continue the policy by paying the monthly premium directly to the insurance provider. Contact Pierce Group Benefits at 1-888-773-0207 for details.

State 401(K) Plan

If you participate in the State 401(K) Plan, you may elect to leave money contributed in the Plan until you reach age 70 1/2. Plan withdrawals are allowed for several reasons. Certain withdrawals prior to age 59 1/2 may be subject to an IRS penalty. For further information, you may contact the Plan Administrator at 1-866-624-0151 or www.retirement.prudential.com.

Tax Sheltered 403(B) Plans or 457(B) Plans

If you are participating in a tax sheltered annuity program, you should contact your agent to determine the contract provision that applies to your annuity account(s) upon retirement from employment. See the contact page for a listing.

Remember, you must set up an appointment to speak with Benefits, regarding your benefits upon retirement, and to complete your retirement paperwork. This should be done approximately four months (120 days) prior to your retirement date.



Frequently Asked Questions

When should I apply for Retirement?

Your application should be submitted 120 days before your planned retirement date. TSERS will not accept an application more than 120 days prior to retirement and waiting until less than 90 days may delay your first retirement check. You will need to make an appointment with Benefits. Simply call HRDC at 980-343-4777 to set an appointment date and time. Please contact us approximately five months prior to your anticipated retirement date to set up your appointment.

What forms need to be filed with TSERS to retire?

You must complete the following form which is available on the TSERS website at www.myncretirement.com.

- Form 6 – Claiming Your Monthly Retirement Benefit

If you are employed by the State immediately prior to your application, CMS will need to complete the back-side of your Form 6 before sending it to the retirement system, which is why an appointment with Benefits is necessary.

Once your forms have been received and processed by TSERS, you will receive:

- Form 6E – Choosing Your Retirement Payment Option
- Form RET-290 – Choosing Your Tax Withholdings
- Form HM – Selecting Health Coverage
- Form 170 – Authorizing Direct Deposit
- Report of Estimated Retirement Benefits

It is extremely important to complete the form 6E and RET-290. If you do not return these forms, TSERS will not be able to begin your retirement payments and your benefits, including your retiree health insurance, will be delayed. The 6E requires a notarized signature.

When will my monthly retirement payment be deposited in my account?

Retirement payments are deposited on the 25th of each month unless the 25th is on the weekend or a holiday. In that case, your check will be deposited on the last business day before the weekend or holiday. In December, however, your check will be deposited on the 20th or before if the 20th is on a weekend. **Please note: Your first retirement payment will be mailed to your home in the form of a check.**

Do I receive a “ Notification of Direct Deposit” of my retirement benefit payment every month?

No. A “Notification of Direct Deposit” is not automatically mailed every month. A “Notification of Direct Deposit” of your monthly benefit payment is mailed the first month your payment is directly deposited to your bank account and any month, thereafter, only if the amount of your deposit changes.

How do I notify the Retirement System of a change in the account to which my monthly payment is being deposited?

In order to change your bank account designation, you should send a written request; signed by you that includes your name, Social Security Number, your new account number, and the routing transit number for the new financial institution (a deposit slip or voided check has this information). Requests that are received in Raleigh by the end of the month will be processed the following month.

Will the Retirement System withhold premiums for supplemental insurance coverage purchased through NCAE, SEANC, or my flexible benefits plan?

No; however, it is likely that the companies that provide the coverage will be happy to draft your bank account.

I had been retired just a few months when the amount of my retirement benefit changed. Why?

Your retirement benefit is generally based, in part, upon the salary earned and reported to the Retirement System during your last 48 months of employment. Many times, verification of the salary paid for your final month of employment is not received by the Retirement System until after your first retirement payment has been issued. Consequently, your retirement benefit must be adjusted, either up or down, in the event the projected salary figures (provided by your employer prior to retirement) do not equal the actual payments of salary you received.

Beneficiary Information

May I, at any time after my retirement, change the beneficiary or optional payment plan I selected at the time of my retirement?

You can change your beneficiary for a monthly survivor benefit or payment option at anytime PRIOR to cashing your first retirement check but no later than the date of the payment of your second monthly benefit. After this time, you will not be allowed the opportunity to change your beneficiary or payment option, unless (1) you have elected a survivorship benefit and your beneficiary is your spouse from whom you become divorced after retirement, or (2) you return to employment covered by the Retirement System from which you retired and continue in covered employment for a period of not less than three years. You can change your beneficiary for the guaranteed refund at any time by completing and submitting Form 336 to the Retirement System.

In the event of a divorce, is my spouse entitled to any of my accumulated retirement contributions or my retirement benefit entitlement?

As a general rule, retirement contributions made, and benefit credits earned, during the period between your marriage and legal separation are includable in “marital property” and subject to equitable distribution. You should consult your attorney for further information.

Upon my death, what should my family do about my retirement benefit?

Upon your death, your survivors should contact the Retirement System immediately. They will need to be provided with your name, Social Security Number, and an original copy of your death certificate. In addi-

tion, if you have elected to provide survivor benefits after your death, they will need to be provided with the Social Security Number and current mailing address of your survivor. The monthly benefit that is payable in the month of your death belongs to your estate and can be kept. Any benefits made payable to you after your death must be returned to the Retirement Systems Division.

TSERS guarantees that your contributions will be returned to you or your beneficiary. Your first monthly retirement benefits are paid from your own contributions plus accumulated statutory interest until this account is exhausted. If there should be a balance in your account at the time of death, these contributions would be returned to your beneficiary when claimed as stated above. However, please remember that most people exhaust the individual account portion several years after retirement.

Tips When Contacting TSERS

Any original document requiring a notarized signature must be mailed to TSERS. They will not accept a fax without the original hard copy as backup.

Recommended times NOT to call, due to high call volume:

- Mondays
- Other days between the hours of noon and 2 p.m.
- The day following the deposit of retirement checks (normally auto-deposited on the 25th of each month).

Their website contains a wealth of knowledge. (www.nctreasurer.com)

- Access the most popular forms including an application for retirement, direct deposit request and retiree health care enrollment form. (Please note that if you choose to retire, you must make an appointment with Benefits. Forms sent directly to Raleigh will be returned to the school system for completion, and your first retirement check will be delayed).
- A retirement estimator program allows you to perform calculations of your retirement benefit using an endless variety of retirement scenarios.

The website may save you a great deal of frustration waiting on hold.

Employment After Retirement

If it is your intention to retire and return to work as soon as possible in order to “double-dip”, then you should not retire, but simply continue to work. Establishing a pre-existing agreement for post-retirement employment with an employer in TSERS is prohibited and could cause retroactive revocation of your retirement benefits.

However, if at some time after you have retired you find you are interested in working and are considering several reemployment opportunities, the following will explain the details of reemployment and the affect it will have on the monthly retirement benefit you receive from the Retirement System.

Employment with an employer that does not participate in the retirement system from which you retired:

If you are receiving reduced (early) or unreduced (service) retirement benefits and you become employed with any employer that does not participate in the Retirement System from which you retired (except the Consolidated Judicial System and Legislative Retirement System), your new earnings will not affect your State retirement benefits.

Employment with an employer that *participates* in the Retirement System from which you retired:

A six month period during which no service is rendered to an employer in the Teachers’ and State Employees’ Retirement System must immediately precede a return to employment. A return to work earlier than six months will revoke your retirement benefit retroactively to your retirement date and all benefits paid to you must be repaid to the Retirement System.

If you are re-employed in a position that requires membership in TSERS, your retirement payment will be stopped on the first day of the month following the month of re-employment, and you will again become a contributing member the same month your payment is stopped. It is your responsibility to notify the State Retirement System that you are rescinding your retirement if you accept a new position subject to retirement contributions. At any time you are re-employed and become a member of the same Retirement System again, your retirement benefits will be greater at the time of your second early/service retirement. If you return to service and contribute for at least three additional years, you can change the retirement payment plan and/or beneficiary you selected at the time of your original retirement.



Reemployment which causes suspension of your retirement benefit will also cause the suspension of your health coverage under the retired group of the Teachers' and State Employees' Plans. Before accepting such reemployment, you should ask the new employer if you will qualify for continued coverage under the active group of the State Comprehensive Major Medical Plan or PPO, and if you will qualify for the State's contribution toward your coverage. Upon restoration of your retirement allowance, your health coverage under the retired group will be reinstated the first of the month following the month your retirement allowance is restored.

Employment under conditions not subject to retirement contributions, but working for a State Employer:

If you are re-employed on a part-time, interim, temporary or contractual basis, or are otherwise engaged to perform services on any basis that does not require membership in TSERS, your retirement payment and health coverage will be stopped if your earnings during any calendar year or the 12 months immediately following your retirement are more than the greater of the following:

- \$28,080; or
- 50% of your compensation, excluding terminal payments, reported to the Retirement System during the 12 months of service preceding the effective date of your retirement.

Retirement laws regarding reemployment are subject to change by the North Carolina General Assembly.

The above amounts are increased on January 1 of each year by the percentage increase in the Consumer Price Index. Your retirement payment and health coverage will be stopped on the first day of the month following the month in which your earnings exceed the

greater of the two limits stated above. Your retirement payment will start again on January 1 of the year after your benefit is stopped.

It is the retiree's responsibility to contact TSERS prior to reemployment to determine his or her 50% earnings cap, so as not to exceed allowable earnings, causing suspension of retirement benefits. If you anticipate an adjustment may be needed to your pay rate to remain within the earnings limit, consult with your HR Manager.

Keep in mind that the recorded absence period for employment and the pay periods are not identical. For instance, days without pay in December may create a deduction in the January payroll, not appearing as a deduction of pay in the calendar year during which the leave was taken. A list of the pay periods and corresponding absence periods are listed in the Payroll Schedule book available at every school. Also note that volunteerism, while desirable, may not be used to avoid earnings limits and may have legal implications for supervision of a classroom or the conduct of other official school business.

Employees with an earnings cap working 30 hours or more per week are classified as full-time, temporary employees and must waive their right to the full-time benefits package from the school system. To be classified as a full-time, temporary employee, the retiree should sign a statement that he or she is not available for nor seeking permanent employment and acknowledges that he or she will not be eligible for employee benefits, including sick leave, annual vacation leave, holidays, longevity, etc. The retiree will continue to receive his or her benefits (checks and health plan) from the Retirement System.

Part-time, permanent employees with an earnings cap working 20 hours per week but less than 30 hours per week can earn pro-rata part-time benefits from the school system and continue to receive their retirement benefits, as long as the earnings cap is not exceeded.

Reemployment of classroom teachers under conditions not subject to earnings restrictions:

If you retire and are reemployed as a classroom teacher, you may teach without earnings restrictions and not have your retirement interrupted provided (i) you have been retired at least 6 months and (ii) have not been employed by the State in any capacity, for at least the 6 months immediately preceding the effective date of reemployment. These provisions are in effect until at least July 1, 2009.

The following became effective July 1, 2004:

1. This legislation was also changed such that an amount equivalent to 11.7% of the salary of a retired teacher with a cap must be contributed to the NC Retirement System. The 11.7% may consist of a salary differential for the employee, a payment by the school district or a combination of the two methods. Many NC districts are charging the entire 11.7% to the retiree. Charlotte-Mecklenburg Schools has chosen to request only 6% of this expense as a salary differential from the employee, and to pay the remaining 5.7%. As such, you can teach during the 2008-2009 school year at your licensed rate minus a 6% adjustment, with Charlotte-Mecklenburg Schools paying the rest. You will simultaneously receive your pension.
2. The retirement system cannot continue to afford to have thousands of retired teachers drawing funds out of the system while occupying a position that would otherwise pay into the system. Simply stated, this contribution will enable North Carolina to continue to allow retired teachers to return to teaching exempt from a postretirement earnings cap.

A retired teacher employed under this provision is to be treated the same as a probationary teacher except he or she is not eligible for career status. Individuals employed under this section receive restricted benefits as a probationary teacher in a similar position, i.e. holidays, annual vacation leave, sick leave, longevity, etc. A retired teacher employed under this section is not eligible:

- a. to be re-enrolled in The Teachers' and State Employees' Retirement System or State Health Plan or
- b. to receive any new additional benefits provided through the Retirement System, i.e. Disability Income Plan, Death Benefit, etc.

The retiree will continue to receive his or her benefits (check and health plan) from the Retirement System.

Reemployment Effects on Health Coverage:

Effective July 1, 2007, reemployment with a State System employer will cause you to be enrolled in the State Health Plan active group coverage if the position would require the employer to pay the State's contribution for your State Health Plan coverage if you were not a retiree. Your active group coverage will continue as long as you remain in that position. Upon termination, you will return to State Health Plan retiree group coverage.

My Retirement Checklist:

- Set Up Retirement Appointment with Benefits
Date: _____ Time: _____
- Review CMS Retirement Book prior to retirement meeting
- Write down any questions I have
- Request benefit estimate from TSERS at least 6 months prior to my date of retirement - Form 309
- Complete retirement forms prior to meeting:
 - Form 6
 - CMS Retirement Form
- Check for date CMS mailed forms to TSERS.
Date: _____
- Receive Form 6E from TSERS approximately 120 days after submitted by CMS.
- Complete Forms 6E (Choosing Your Retirement Payment Option) and 290 (Choosing Your Tax Withholdings) and return to Raleigh per instructions.
- Received and responded to my notice of retirement insurance benefits for dental and vision coverage from State Insurance Services
on _____
- Received and returned my \$10,000 Death Benefit paperwork to Raleigh
on _____
- The deadline for requesting the form for conversion of my life insurance from a CMS group policy to an individual Universal Life policy is the date of my retirement.
- Enjoy Retirement Celebrations.
- Receive first check from TSERS around the 25th of the month following month of retirement.*

**All first retirement payments are sent in check form. Direct Deposits are verified this first month and typically begin the second month.*

Contact Information

Teachers' and State Employees' Retirement System:

Employees Call: 1-877-627-3287
 Retirees Call: 1-877-733-4191
 Email address: nc.retirement@treasurer.state.nc.us
 Mailing address: Teachers' and State Employees' Retirement System
 325 North Salisbury Street
 Raleigh, NC 27603-1385
 Web site: www.myncretirement.com

Pierce Group Benefits (Colonial Insurance Policies) 1-888-773-0207

Flex Corp (Flexible Medical and Dependent Care reimbursement) 1-888-505-4557

State Insurance Services (Retiree Dental and Vision) 1-800-462-7864
 or 1-919-571-0150
 www.stateinsservices.com

State Health Plan 1-877-733-4191
 www.shpnc.org

Medco Health Solutions (Prescription Provider) 1-800-336-5933
 www.medco.com

Sun Life Assurance Company of Canada 1-800-247-6875
 www.sunlife-usa.com

Social Security www.ssa.gov

Medicare www.medicare.gov

Prudential 401(k) 1-866-624-0151
 www.retirement.prudential.com

403(b), 457(b) and ROTH Plan Carriers:

CARRIER	REPRESENTATIVE	PHONE	WEB SITE
AIG/VALIC Financial Advisors	Martha Catt	(704)-502-6649	www.aigretirement.com
AXA Equitable	Bradley Turner	(704)-540-2943	www.axaonline.com
Horace Mann	Joyce Tice	(704)-532-1111	www.horacemann.com
ING	Ned Freer	(888)-818-3246	www.ingretirementplans.com
Lincoln Financial Group	Jason Key	(877)-853-1444	www.inc.om
Security Benefits	Cliff Robinson	(704)-982-6700	www.neamb.com

CHARLOTTE-MECKLENBURG SCHOOLS RETIREMENT FORM

Employee's Name _____ Social Security # _____

Please complete this section if you are *Retiring*

I wish to RETIRE as an employee of the Charlotte-Mecklenburg Schools at the close of the day on _____

Specific Job Title/Position _____
School/Dept/Area _____

IMPORTANT

() I understand that I must come to the Benefits Department to complete the Retirement paperwork and this form.

ALL EMPLOYEES MUST COMPLETE THE FOLLOWING INFORMATION

Life Insurance

Your group insurance coverage terminates the last day of the month in which you retire. To convert this coverage to an individual policy, application must be made within 31 days of your retirement date.

Health Insurance

Teachers' and State Employees' Comprehensive Major Medical Plan

- I am eligible for health insurance membership in the retired group. (I understand I am responsible for dependent coverage premiums.)

Dental Insurance

- I understand I will receive information regarding my COBRA rights and I am responsible for all continued coverage premiums. I understand that to be eligible for COBRA I must be enrolled in the dental plan at Retirement.

Vision Insurance

- I understand I will receive information regarding my COBRA rights and I am responsible for all continued coverage premiums. I understand that to be eligible for COBRA I must be enrolled in the vision plan at Retirement.

I have read the above benefit information and understand that it is my responsibility to elect coverage and pay the required premiums within the specified time frame.

Employee's Signature _____ Date _____ Telephone # (____) _____

Forwarding Address _____ (House/POB #) _____ (City) _____ (State) _____ (Zip Code) _____

III. COMMUNICATIONS/STAFF RELATIONS

1. Working Relationships:

- A. Harmonious professional relationships existed; level of staff cooperation was high
- B. Staff generally got along; however, occasional difficulties occurred
- C. Little cooperation among staff (Did supervisor appear to be aware of staff's unfavorable interaction?)
 Yes No

2. Departmental Communication:

- A. General effort made to keep staff informed
- B. Received most information, but not always timely
- C. Hardly ever received information, had to seek it out

3. Systemwide Communication,

- A. General effort made to keep employees informed
- B. Received information, but not always timely
- C. Hardly ever received information, had to seek it out

IV. DEGREE OF SUPERVISOR'S INVOLVEMENT

1. Supervisor's Role:

- A. Felt supervisor was instrumental in establishing a positive work environment
 - B. Supervisor's role was generally more positive than negative
 - C. Supervisor's influence was definitely detrimental to morale (Please explain) _____
-
-

2. Supervision and Direction:

- A. Felt supervisor gave necessary guidance and information to operate efficiently
 - B. Guidance generally given, but sometimes had to teach yourself
 - C. Guidance seldom given, even when needed (How was your supervisor made aware of your concerns?) _____
-
-

3. Treatment from Supervisor:

- A. Always treated fairly, with respect and dignity
- B. Sometimes treated fairly, with respect and dignity
- C. Seldom or never treated fairly, with respect and dignity

4. Recognition:

- A. Felt supervisor was aware of your work and gave recognition for achievements and a job well done
- B. Supervisor sometimes acknowledged achievements
- C. Supervisor generally failed to acknowledge achievements

5. Support and Encouragement:

- A. Always received excellent support in solving problems and frequent encouragement to offer suggestions
- B. Sometimes received support and encouragement
- C. Seldom or never received support and encouragement

V. NEW HIRE ORIENTATION

- Very thorough and complete; answered all of my questions regarding employment with Charlotte-Mecklenburg Schools
 - Adequate
 - Inadequate (Please explain) _____
-
-

VI. TRAINING AND PROFESSIONAL DEVELOPMENT

- A. Excellent; classes, workshops, and other learning opportunities were provided on a regular basis
 - B. Sufficient; new opportunities for learning were provided on an as needed basis
 - C. Insufficient (Please explain) _____
-
-

What other comments do you have about your former position or CMS that you feel would be helpful to us?

Would you like to have a confidential, personal interview with a member of the exit team to discuss any unresolved questions, conditions, or feelings related to your leaving?

- A. Yes
- B. No
- C. No, but would participate in a personal interview if asked.

If you checked yes, make sure that you have included a phone number where you can be contacted by an exit team member from the Employee Relations office.

***PLEASE RETURN THE QUESTIONNAIRE TO THE EMPLOYEE RELATIONS
OFFICE IN THE EDUCATION CENTER***

CMS
Attention: Employee Relations
701 East Martin Luther King, Jr. Blvd.
Charlotte, NC 28202

or
Attention: Employee Relations
Courier # 835