

## Davis Joint Unified School District - CalPERS Withdrawal Project Timeline

Task	Timeline	Responsible Party	Due Date	Pending	Completed	Project Time	Comments/Notes
<b>Plan Review</b>							
<b>Document Gathering</b>							
Rate Exhibits per Plan	January	DJUSD			X		
Census	January	DJUSD			X		
<b>Insurance Needs Assessment</b>							
Plan Comparison Review	TBD	Keenan/DJUSD	2/15-2/22				
Plan Modifications	TBD	Keenan	2/15-2/22				
<b>Insurance Marketing Plan - Actives/Early Retirees</b>							
<b>Submission of RFP's to selected vendors</b>	January -February	Keenan		X			
<b>Carriers:</b> Kaiser/Anthem Blue Cross/Blue Shield/Health Net/Aetna/CIGNA/United Healthcare/Sutter Health Plus/Western Health Advantage							
<b>JPA's:</b> CCCSIG/SISC/SMCMC							
<b>Trusts:</b> CVT							
<b>Insurance Marketing Plan - Post 65 Retirees</b>							
<b>Submission of RFP's to selected vendors</b>	January - February	Keenan					
<b>Carriers:</b> Kaiser/Anthem Blue Cross/Blue Shield/Health Net/Aetna/CIGNA/United Healthcare/Western Health Advantage/The Hartford/RetireeFirst/Futuris Care							
<b>CalPERS Renewal</b>							
Review Preliminary Renewal	May - June	Keenan/DJUSD					
Review Final CalPERS Renewal	June - July	Keenan/DJUSD					
<b>Insurance Marketing Results</b>							
Review of RFP comparisons and proposals	June-July	Keenan					Based on received proposals
Present RFP's - Meeting Date	June-August	Keenan/DJUSD					
Review of Recommended RFP's	TBD	Keenan/DJUSD					
<b>Review of Final Insurance Placement</b>							

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Task	Timeline	Responsible Party	Due Date	Pending	Completed	Project Time	Comments/Notes
Final Review of Applicable Proposals	July-Aug 2023	Keenan/DJUSD					Based on CalPERS Renewal Release date
<b>CalPERS Termination Notice</b>							
District Board Meeting	August-Sept.	DJUSD	8/3 8/17 9/7				Based on CalPERS Renewal Release date - Termination notification due 60 days after the renewal release date.
Final Written Termination Notice to CalPERS	August-Sept.	DJUSD					
<b>District Website Information</b>							
Set-up intranet site for informational documents	January	DJUSD			X		
Documents: District Statement/FAQ's/CalPERS Rules/Timeline	January	Keenan			X		
FAQ regarding process and why district is exploring a withdrawal from CalPERS option	January/February	DJUSD/Keenan	1/23		X		
FAQ for Retires (Early & Post)	January/February	DJUSD/Keenan	1/23		X		
FAQ for Actives	January/February	DJUSD/Keenan	1/23		X		
Employee Survey	January/February	DJUSD/Keenan	3/6	X			Will submit after Town Hall Meetings
<b>Town Hall Meetings</b>							
Inform <b>Retirees</b> Employees of Districts interest in withdrawing from CalPERS	February/March	Keenan/DJUSD	3/7	X			
Inform <b>Active</b> Employees of Districts interest in withdrawing from CalPERS	February/March	Keenan/DJUSD	3/8	X			
Email for personal/private questions	Ongoing	Keenan/DJUSD		X			
<b>District Meeting Dates: Wednesday, 3-5pm: 1/25 02/15 2/22 3/22 4/26 5/24 6/21 7/26 8/2 8/7 8/30 9/6 9/20</b>							