

**BPS Employee Voluntary Bereavement Program (BEVBP)**

The Board of Education authorizes the employees of Bixby Public Schools (BPS) to operate a voluntary bereavement program in the district's activity fund.

1. Membership in the program is limited to current full-time and part-time employees of the district and new full-time and part-time employees of the District, beginning October 1, 2015. Support and other employees on a short-term, temporary contract of employment are not eligible for this program. Certified staff employed by BPS on a first or second year temporary contract are eligible for this program. Persons conducting work for BPS via vendor contract and not paid through BPS payroll are not eligible for this program. Persons conducting work for BPS via a lay and/or volunteer contract and not paid through BPS payroll are not eligible for this program.
2. An employee's spouse is eligible for membership in the program.
3. The program is authorized to begin October 1, 2015.
4. No membership fee shall be collected by the District until the beginning date of the program, October 1, 2015. The membership fee must be paid by the employee member and the employee member's spouse, if applicable.
5. No pay out from the program shall be authorized until the beginning date of the program, October 1, 2015.
6. If any due date in this policy falls on a weekend or a holiday, the next business day after the weekend or holiday shall apply as the due date.
7. The failure to comply with due dates established in this policy constitutes the forfeiture of the qualification for membership and benefits in the program.
8. The BEVBP is a program designed for the purpose of paying a benefit to the named beneficiary of a BEVBP member who dies while the member is employed at Bixby Public Schools.
9. Upon the effective date of the employee's termination date of employment with the district, membership of the employee and spouse (if applicable) in the BEVBP is likewise terminated.
10. In order for the benefit to a named beneficiary to be paid to the beneficiary, an official death certificate identifying the date and time of the death of the BEVBP member must be provided to Bixby Public Schools. Upon receipt of a valid death certificate and within sixty (60) business days, a check in the amount of the benefit will be produced for the beneficiary.
11. A BPS employee or employee's spouse, if applicable, is not considered a member of the BEVBP until the completed enrollment form is received by Bixby Public Schools.
12. The BEVBP program's only requirement for a payment to the beneficiary is the death of a BEVBP member and proof of death via an official death certificate. The cause of death is not relevant to the payment of the benefit to the beneficiary.
13. The beneficiary of a member who dies on or after October 1, 2015 shall be eligible for a benefit from the program.
14. Upon initial startup of the program all employees, current and new, of the District will have the option to participate in the program. A BPS employee must opt in/complete the initial enrollment in the program on or before October 1, 2015. During the initial year of the BEVBP, BPS employees hired after September 30, 2015 and on or before June 30, 2016, must opt in/complete the enrollment form (including

spouse enrollment, if applicable) and BPS must receive the enrollment form within the first 30 days of the employee's employment with BPS.

15. Beginning July 1, 2016 and thereafter, employees hired between July 1 and August 31 shall have until October 1 to option in/complete the enrollment form. For employees hired after August 31, the employee shall have 30 calendar days from the date of hire by the Board of Education to option in/complete the enrollment form.

16. If an employee chooses to option out of the program, the employee shall not be eligible to option in at any point of their employment with Bixby Public Schools. If an employee chooses to option out and the employee terminates from the district, the employee shall be eligible to option in the program upon re-employment with the District according to the timeline requirements identified in this policy for new employees.

17. Upon optioning in the program, a total of \$10.00 (ten dollars) shall be deducted from the employee's next District payroll check. If the employee's spouse (who is not an employee of the District) also participates in the program, \$10.00 (ten dollars) for the spouse's membership fee shall be likewise deducted from the employee's next District payroll check .

18. Thereafter, each time there is a death of a member and a qualified payout to a beneficiary of a member of the program from the BEBAFA, \$10.00 (ten dollars) shall be deducted from the next District payroll check of each member of the BEVBP (and an additional \$10.00 if the employee's spouse (who is not an employee of the District) is a member).

19. The Program membership dues (minus administrative fee) shall be deposited in the Bixby Employee Bereavement Activity Fund Account (BEBAFA). The BEBAFA shall be a sub-account in the BPS activity account. The BEBAFA shall not accrue interest.

20. A member of the BEVBP may cancel their membership (and spouse's membership, if spouse is not an employee of the District) at any time during employee member's employment with BPS. Cancellation of membership must be completed in writing on the **Change of Information Form**. No refunds of membership fee(s) shall be available to a member (or spouse, if applicable) who cancels his/her membership. An employee member who cancels membership must also cancel the spouse's (if applicable) membership.

21. Upon initial enrollment in the program, a member may enroll his/her spouse (if the spouse is not an employee of the District) in the program according to the same timeline guidelines of this program for employees.

22. A member may cancel the membership of his/her spouse (if spouse is not an employee of the District) at any time. The employee's spouse shall not be eligible to option back in the program at any point during the continued employment of the member. If the employee member of the program terminates employment and is later employed by the District, the employee's spouse shall be eligible for membership on the program.

23. If a member is single at the time of initial membership in the program and marries and/or divorces and remarries while a member of the program, the member may enroll his/her non-District employee spouse in the program within 30 days of getting married.

24. A member who cancels his/her membership for any reason must also cancel the membership of their spouse (if applicable and spouse is not an employee of the District) and shall not be eligible for membership in the future unless upon terminating from BPS and later becoming an employee of BPS again.

25. A member's membership (and spouse's, if applicable) coincides with and automatically terminates when the employee member's employment with BPS is terminated. No refunds of membership fee(s) shall be available upon termination of employment or voluntary termination from the program.

26. Upon opting in the program, the member shall designate one primary beneficiary and may designate one secondary beneficiary, providing the full name, social security number, address, phone number, and email address (if available) of each beneficiary.

27. The employee member of the program may change and/or update beneficiary information using the **Change of Information Form**. Such change and/or update shall not be considered valid until received by the District on the **Change of Information Form**.

28. Management and recordkeeping for the program shall be the responsibility of the District's Employee Benefits Coordinator. Direct administrative oversight of the program shall be provided by the District's Chief Financial Officer.

29. Upon the death of a member, the named beneficiary of the member shall be eligible for a payment from the BEBAFA in the form of a check for the total amount of the \$10.00 dues paid to and collected by the school from each member (less administrative fee). A payout to a beneficiary must be approved by the Superintendent, Chief Financial Officer, and Treasurer of the District as well as the Board of Education as an encumbrance.

30. The amount of the pay out to the beneficiary is dependent upon the amount of the balance of the BEBAFA. There is NO guaranteed amount of a payout. The payout is dependent upon the total number of members and the actual amount collected (less administrative fee) from members since the inception of the program or last payout upon the death of a member. The intent of the program is to collect \$10.00 from each member of the program at the initial startup and after each death of a member in the program, resulting in a payout to a beneficiary of a member of the program of \$10.00 (minus administrative fee) from each member to the named beneficiary of a deceased member.

31. Although the District shall attempt to collect the membership fee of \$10 from each member by payroll deduction at the inception of the program and after each member death and benefit payout in the program, there is no guarantee that the District will be successful in collecting all membership fees. Therefore, only the amount successfully collected from members by the District (less administrative fee) shall be paid out to the member's beneficiary.

32. In the event of a member's death and the primary beneficiary of the member is deceased or does not respond to notification of benefit eligibility within ninety (90) days following notification of benefit eligibility, the benefit shall be paid to the secondary beneficiary.

33. In the event of a member's death, Bixby Public Schools will contact the named beneficiary via the information provided on the **Enrollment Form** or **Change of Information Form**. If the benefit is not claimed according to the requirements of this policy by the named primary beneficiary (or secondary beneficiary, if applicable) within 90 calendar days of notice of the benefit, the benefit shall be paid as a donation to the Bixby Education Endowment Fund in the name of the member.

34. In the event that multiple deaths occur in between payroll periods of employee members, no more than two dues deductions shall be made from one payroll period of an employee member. The amount of dues owed by the employee member shall be paid the program via payroll deduction over a prorated system of periodic payroll deductions in such situations.

35. In the event that multiple deaths occur in between payroll periods of employee members and multiple payroll periods are necessary in order to collect all dues from members for each death of a member, the beneficiary pay out of the program will be based on date and time of the application for a benefit of an eligible beneficiary, with the first to make application receiving the program pay out first, followed by another eligible beneficiary according to the order of application by date and time.

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