

Unofficial Board Minutes

Mission Statement: *“We are a community of learners. We will do whatever it takes to learn. We are building a strong foundation by believing we can, working our plan, then feeling the power of success.”*

George Washington Academy
Thursday, September 29, 2022
4:00 p.m.

Board Meeting Minutes

Location:

Courtyard by Marriott
185 South 1470
St. George

The meeting will also be available through Zoom. Anyone interested in participating via Zoom conferencing can email Shannon Greer at sgreer@gwacademy.org for call-in information.

The Board Retreat was held after the Board Meeting.

The Board meeting convened at 4:00 p.m.

Board Welcome: Shannon Greer, President

Roll Call: Shannon Greer, President

Prayer: Jaycee

Pledge of Allegiance: TBD

Approval of Minutes: Kevin Peterson made a motion to approve the minutes from the August 25, 2022 meeting. Holly Myers seconded. Casey Unrein pointed out grammatical changes and made mention of the GoGaurdian vote which was passed unanimously which was not outlined in the notes. Kevin made a motion accept the minutes with the changes. Holly Myers seconded. The motion passed unanimously (Shannon Greer, Casey Unrein, Kevin Peterson, and Holly Myers. Shauna Mahoney and Jaycee Rogers abstained).

Minutes from August 25, 2022 Board Meeting (Board Packet pgs. 1-4)

Board Members Present: Shannon Greer, Amanda Mortenson, Casey Unrein, Kevin Peterson, Blake Clark, Holly Myers, and Jaycee Rogers

Board Members Absent: None

Others Present: Steve Erickson, Debbie Kuavaka, Jocelyn Larkin, Chance Manzanares, Kari McCoy

Public Opportunity to Address the Board: None

Set time for adjournment: The time set for adjournment was 5:25 p.m.

Teacher Representative Report:

The student Lighthouse Team reported on their upcoming activities and the purpose of the Lighthouse Team.

Jocelyn Larkin reported on proficiency based grading and reported on the positive change with the language around grading. Students are less concerned about assignments going into PowerSchool and are always seeking to do their best. She reported that SEPs conferences are more student lead and the students are more excited to report their progress. Amanda Mortenson asked about concerns or areas of excitement around proficiency grading. Mrs. Larkin reported that she didn't have concerns, but was excited that all students will benefit from this new grading structure and feel successful.

Administration Report: Blake Clark, Executive Director, reported that all reports listed are complete. He reported on the student count as of September 29, 2022. He reported on Acadience data and expressed excitement about the growth that will take place this year. The third grade saw great success on the beginning of the year assessment. Casey Unrein asked about when the board would be able to look at math data. Blake Clark said that the paper data is being collected right now and the process has begun to make it shareable with the board. Casey asked about the student membership audit and when that takes place. October 1st is the date those numbers are taking place.

Financial Report: Spencer Adams, Business Administrator, reported that the August budget report is looking good. Local revenue is slightly ahead of where we should be due to more favorable interest rates. The state revenue is also slightly ahead of schedule. The federal lunch schedule will reflect on the next report. The line items in red on the budget detail report are expected back to school expenses. Line item 1920 Principal Discretionary will be removed from the budget detail report. Casey Unrein asked about students who had a lunch balance on their account (to be spent) and is no longer attending the school, what happens to their balance. Spencer reported that there are avenues for students to be refunded (bill.com). All the reports are complete.

Committee Reports (3 min each):

- **Policies Committee** – Blake Clark, the committee will update the procurement policy. They are reviewing policies 600-800. Kevin Peterson would like to re-visit the PTO policy regarding teacher's time off and the cost to the teacher for taking additional days off.
- **Finance Committee** – Nothing new to report.

- **Benefits Committee** – The committee met September 28, 2022 and made changes to the PTO policy. They are meeting again next week.
- **Curriculum Committee** – Shannon Greer reported that the committee did not move forward with the science curriculums that were evaluated last year. They are looking at new curriculums this year.
- **Outreach Committee** – Holly Myers reported that the committee met and had a good discussion about what the committee has done in years past and where they would like to go. They focused their discussion on the openings in 4th grade and how to get more students enrolled.
- **Technology Committee** – Nothing new to report.
- **LAND Trust Committee** – Nothing new to report.
- **PTO Committee** – Amanda Mortensen, reported that the PTO is concerned about teacher support with activities. Mr. Clark is going to send out a memo to teachers via e-mail. PTO discussed giving wristbands out at the fall fundraiser. Holly Myers pointed out that giving wristbands might not be the best use of funds as the fundraiser might not draw non-GWA students like the previous fall fundraisers have.
- **Board Development Committee** – Shannon Greer reported that in the board retreat, board members will brainstorm ideas for future trainings.
- **Campus Management Committee** – Nothing new to report. Blake Clark requested that the PTO establish what the upcoming fundraisers are and if they are affecting the property that the fundraiser is approved through the campus management committee.

Discussion and/or Action Items:

- Expenditures over \$5,000: None
- **2023-2024 Student Calendar:** Kevin Peterson made a motion to accept the student calendar for the 2023-2024 school year as outlined in the board packet. Holly Myers made a second. The motion passed unanimously. All Present Voted in favor: Shannon Greer, Amanda Mortenson, Casey Unrein, Kevin Peterson, Blake Clark, Holly Myers, and Jaycee Rogers
- **Salary Increase:** Casey Unrein made a motion to approve the salary increase as outlined in the board packet. Kevin Peterson made a second. Blake Clark reported that this increase occurred due to the school district re-publishing their pay schedules. Kevin Peterson reported that the finance committee has reviewed the salary increase and it is sustainable. The motion passed unanimously. All Present Voted in favor: Shannon Greer, Amanda Mortenson, Casey Unrein, Kevin Peterson, Blake Clark, Holly Myers, and Jaycee Rogers

Closed Meeting – *none*.

Reconvene

Next Meeting: The next regular Board Meeting will be held October 27, 2022 at 7:30pm.

Adjournment

The board meeting adjourned at 5:26 p.m.

Submitted by Jaycee Rogers, Board Secretary



Financial Summary

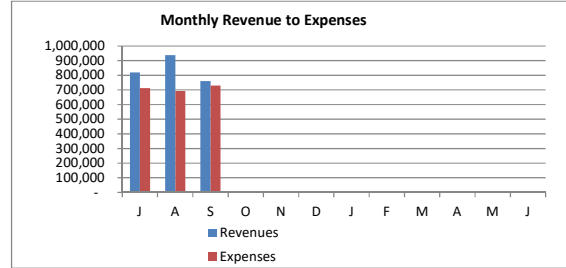
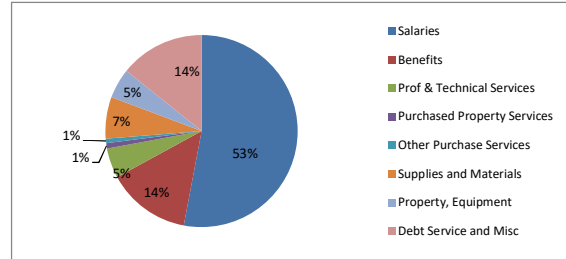
as of September 30, 2022

BUDGET REPORT EXPENSES RATIOS

25% through the Year

Green - more than 5% ahead of forecast
 Yellow - within 5% of forecast
 Red - more than 5% behind forecast

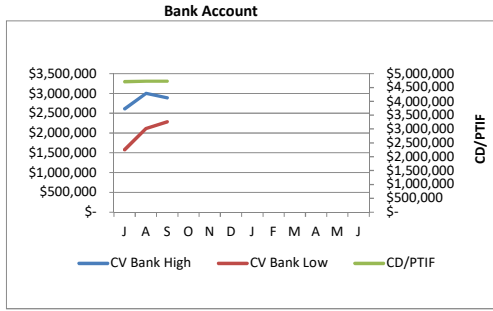
	Year-to Date Actuals	Approved Budget	Forecast	% of Forecast
Enrollment	1013	1010	1000	
Revenue				
1000 Local	\$ 113,301	\$ 226,049	\$ 269,758	42%
3000 State	\$ 2,387,307	\$ 8,618,679	\$ 8,927,077	27%
4000 Federal	\$ 17,273	\$ 463,667	\$ 458,212	4%
Total Revenue	\$ 2,517,881	\$ 9,308,395	\$ 9,655,047	26%
Expenses				
100 Salaries	\$ 1,032,364	\$ 4,853,645	\$ 4,968,342	21%
200 Benefits	\$ 260,770	\$ 1,286,490	\$ 1,325,040	20%
300 Prof & Technical Services	\$ 127,928	\$ 424,167	\$ 472,804	27%
400 Purchased Property Services	\$ 20,960	\$ 84,000	\$ 84,000	25%
500 Other Purchase Services	\$ 8,286	\$ 68,300	\$ 68,300	12%
600 Supplies and Materials	\$ 239,553	\$ 655,797	\$ 657,714	36%
700 Property, Equipment	\$ 118,843	\$ 342,800	\$ 474,843	25%
800 Debt Service and Misc	\$ 327,551	\$ 1,334,713	\$ 1,334,713	25%
Total Expenses	\$ 2,136,255	\$ 9,049,911	\$ 9,385,755	23%
Net Income from Operations	\$ 381,626	\$ 258,484	\$ 269,292	142%
Operating Margin	15.2%	2.8%	2.8%	



	Actual	Goal	Covenant	Prior Mth Change
Operating Margin	2.8%	5%		-0.01%
Debt Service Coverage	1.21	1.25	1.05	0.01
Days Cash on Hand	296	130	30	2
Building Payment %	13.7%	< 22%		-0.40%

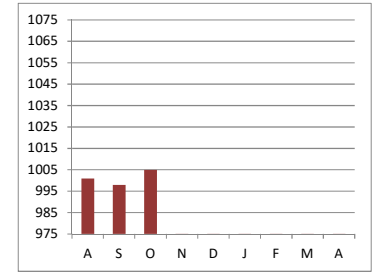
CASH RESERVES ENROLLMENT

Month Ending Cash Balance	\$ 7,613,061	Includes \$1,257,951 CD \$3,466,685 PTIF
Days Cash on Hand	296	



	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 5,841,739	\$ 5,841,739
Reserves Added this Year	\$ 381,626	\$ 269,292
Project 1	\$ -	\$ -
New Reserve Balance	\$ 6,223,365	\$ 6,111,031

	A	S	O	N	D	J	F	M	A
K	127	129	133						
1	133	132	130						
2	140	140	141						
3	140	140	140						
4	123	120	122						
5	131	131	132						
6	108	107	108						
7	99	99	99						
Total	1001	998	1005	0	0	0	0	0	0
WPU	862.34								



Budget Detail Report

Actuals as of: **September 30, 2022**

Percentage of Year: **25%**



Revenue	(1013 Students)		(1010 Students)		1000		
	FY22 Actuals	Current Yr Actuals	Approved Budget		Changes	Forecast	% of Forecast
1000 Revenue From Local Sources							
1510 Interest	\$ 36,256	\$ 32,461	\$ 33,500	\$ 31,500	\$ 65,000	49.9%	
1600 Food Services	\$ 33,519	\$ 61,049	\$ 175,000	\$ -	\$ 175,000	34.9%	
1741 Student Activities and Fees	\$ 8,332	\$ 1,185	\$ 6,000	\$ -	\$ 6,000	19.8%	
1741 Textbook and Library Fees	\$ 229	\$ -	\$ -	\$ -	\$ -	0.0%	
1920 Donations	\$ 11,497	\$ 8,712	\$ 6,349	\$ 3,651	\$ 10,000	87.1%	
1920 Field Fund Donations	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
1920 Leadership Flags	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
1920 GWA Gives Back	\$ 5,009	\$ -	\$ -	\$ -	\$ -	0.0%	
1920 Background Checks	\$ 1,496	\$ 599	\$ 1,200	\$ -	\$ 1,200	49.9%	
1920 Staff Lounge	\$ 2,723	\$ 342	\$ 3,000	\$ -	\$ 3,000	11.4%	
1920 Principal Discretionary	\$ 162	\$ -	\$ -	\$ -	\$ -	0.0%	
1920 Dixie Direct Fundraiser	\$ -	\$ 8,558	\$ -	\$ 8,558	\$ 8,558	100.0%	
1930 Sales of Assets	\$ 6,573	\$ 395	\$ 1,000	\$ -	\$ 1,000	39.5%	
1990 Miscellaneous Income	\$ 5,319	\$ -	\$ -	\$ -	\$ -	0.0%	
Total 1000:	\$ 111,115	\$ 113,301	\$ 226,049	\$ 43,709	\$ 269,758	42.0%	
3000 Revenue From State Sources MSP							
30-3005 Regular School Program K	\$ 277,873	\$ 68,384	\$ 297,672	\$ -	\$ 297,672	23.0%	
30-3010 Regular School Program 1-12	\$ 3,011,210	\$ 805,881	\$ 3,226,515	\$ -	\$ 3,226,515	25.0%	
30-3020 Professional Staff	\$ 230,673	\$ 61,321	\$ 226,817	\$ -	\$ 226,817	27.0%	
Special Ed Deferred Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
31-1205 Sped Educ Reg Add-On WPUS	\$ 358,660	\$ 94,942	\$ 372,386	\$ -	\$ 372,386	25.5%	
31-1210 Sped Educ Reg Self Contained	\$ 31,022	\$ 10,084	\$ 31,025	\$ -	\$ 31,025	32.5%	
31-1220 Sped Educ Extended Year Program	\$ 2,259	\$ 930	\$ 3,331	\$ -	\$ 3,331	27.9%	
31-1225 Sped Educ State Programs	\$ 5,997	\$ 1,839	\$ 5,557	\$ -	\$ 5,557	33.1%	
31-1278 Sped Educ Stipends Extended Year	\$ 1,904	\$ -	\$ 784	\$ -	\$ 784	0.0%	
31-5201 Class Size Reduction K-8	\$ 351,803	\$ 93,749	\$ 345,922	\$ -	\$ 345,922	27.1%	
31-5344 Enhancement for At-Risk Student	\$ 64,658	\$ 22,984	\$ 63,577	\$ -	\$ 63,577	36.2%	
31-5901 Career and Tech Ed Dist. Add-On	\$ 5,668	\$ 1,469	\$ 5,897	\$ -	\$ 5,897	24.9%	
31-5903 CTE Comprehensive Counseling	\$ 20,000	\$ 5,000	\$ 19,666	\$ -	\$ 19,666	25.4%	
32-0500 Charter School Admin. Costs Base Funding	\$ 96,528	\$ 23,587	\$ 94,914	\$ -	\$ 94,914	24.9%	
32-5619 Charter School Local Replacement	\$ 2,746,917	\$ 735,621	\$ 2,899,000	\$ -	\$ 2,899,000	25.4%	
32-5651 Educator Professional Time	\$ -	\$ 67,745	\$ -	\$ 84,681	\$ 84,681	80.0%	
32-5653 Public Ed Capital & Technology	\$ -	\$ 128,603	\$ -	\$ 128,603	\$ 128,603	100.0%	
33-5641 Early Intervention - OEK	\$ 152,652	\$ 37,500	\$ 152,652	\$ -	\$ 152,652	24.6%	
33-5805 Early Literacy	\$ 51,450	\$ 8,518	\$ 50,590	\$ -	\$ 50,590	16.8%	
34-5642 Elementary School Counselor Grant	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ 50,000	0.0%	
34-5807 Teacher Salary Supplement Program	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
34-5868 Teacher Supplies and Materials	\$ 7,415	\$ 5,928	\$ 7,415	\$ -	\$ 7,415	79.9%	
34-5876 Educator Salary Adjustment	\$ 248,457	\$ 62,114	\$ 248,457	\$ -	\$ 248,457	25.0%	
34-5911 ELL Software	\$ 6,632	\$ -	\$ -	\$ -	\$ -	0.0%	
35-5420 School Land Trust Program	\$ 134,357	\$ 137,330	\$ 137,145	\$ 185	\$ 137,330	100.0%	
35-5655 Digital Teaching & Learning	\$ 62,886	\$ -	\$ 58,919	\$ 1,917	\$ 60,836	0.0%	
35-5666 Professional Learning Grant	\$ -	\$ 2,258	\$ -	\$ 8,812	\$ 8,812	25.6%	
35-5678 TSSA	\$ 165,244	\$ -	\$ 163,633	\$ 33,234	\$ 196,867	0.0%	
35-5679 School Based Mental Health Grant	\$ 54,851	\$ -	\$ 54,851	\$ 623	\$ 55,474	0.0%	
35-5810 Library Books & Elective Resources	\$ 1,067	\$ 267	\$ 1,049	\$ -	\$ 1,049	25.5%	
Library ARPA Physical Collection Grant	\$ 2,000	\$ -	\$ -	\$ -	\$ -	0.0%	
Children & Teen Enhancement Grant	\$ 3,000	\$ -	\$ -	\$ -	\$ -	0.0%	
38-5673 Substance Prevention	\$ 2,333	\$ 4,000	\$ 2,294	\$ 1,706	\$ 4,000	100.0%	
38-5674 Elementary Suicide Prevention	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	100.0%	
LETRS Professional Development Grant	\$ -	\$ -	\$ -	\$ 48,637	\$ 48,637	0.0%	
38-8070 School Lunch (Liquor Tax)	\$ 121,242	\$ 6,253	\$ 70,000	\$ -	\$ 70,000	8.9%	
19-5601 Beverly Taylor Sorenson Grant	\$ 26,541	\$ -	\$ 27,611	\$ -	\$ 27,611	0.0%	
Total 3000:	\$ 8,296,299	\$ 2,387,307	\$ 8,618,679	\$ 308,398	\$ 9,927,077	26.7%	
4000 Revenue From Federal Sources							
42-7210 ESSER CARES	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
42-7215 ESSER II CARES	\$ 45,009	\$ -	\$ 29,231	\$ -	\$ 29,231	0.0%	
42-7220 GEERS	\$ 22,714	\$ -	\$ -	\$ -	\$ -	0.0%	
42-7225 ESSER III ARP	\$ 448,374	\$ -	\$ 54,000	\$ -	\$ 54,000	0.0%	
45-7280 Corona Relief Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
45-7522 IDEA Pre-School	\$ 2,588	\$ -	\$ 2,588	\$ -	\$ 2,588	0.0%	
45-7524 IDEA Flow-Through	\$ 141,461	\$ -	\$ 141,461	\$ -	\$ 141,461	0.0%	
45-8075 National School Lunch Program	\$ 46,614	\$ 6,644	\$ 40,000	\$ -	\$ 40,000	16.6%	
45-8075 Free & Reduced Reimbursement	\$ 545,496	\$ 8,002	\$ 115,000	\$ -	\$ 115,000	7.0%	
45-8075 School Breakfast Program	\$ 57,387	\$ 2,627	\$ 35,000	\$ -	\$ 35,000	7.5%	
45-8081 Emergency Operating Funds	\$ 536	\$ -	\$ -	\$ -	\$ -	0.0%	
47-7290 CARES UEN WiFi	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	
48-7801 Federal Title I A	\$ 93,232	\$ -	\$ 32,784	\$ -	\$ 32,784	0.0%	
48-7860 Federal NCLB Title II A	\$ 14,409	\$ -	\$ 13,603	\$ (5,455)	\$ 8,148	0.0%	
Total 4000:	\$ 1,417,820	\$ 17,273	\$ 463,667	\$ (5,455)	\$ 458,212	3.8%	
Total Revenue:	\$ 9,825,234	\$ 2,517,881	\$ 9,308,395	\$ 346,652	\$ 9,655,047	0.0%	



(1013 Students)

(1010 Students)

1000

Expenses	(1013 Students)	Current Yr	(1010 Students)	1000		
	FY22 Actuals	Actuals	Approved Budget	Changes	Forecast	% of Forecast
100 Salaries						
121 Administration	\$ 348,257	\$ 93,864	\$ 390,906	\$ 8,000	\$398,906	23.5%
131 Teachers	\$ 2,464,001	\$ 647,414	\$ 2,653,940	\$ 97,715	\$2,751,656	23.5%
131 Special Education Salaries	\$ 209,402	\$ 45,423	\$ 223,304	\$ 1,159	\$224,463	20.2%
132 Substitute Teachers (PTO Stipend)	\$ 8,326	\$ -	\$ 30,000	\$ -	\$ 30,000	0.0%
132 SpEd Substitutes	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%
131 Stipends / Merit Pay	\$ 80,397	\$ 18,000	\$ 52,020	\$ -	\$ 52,020	34.6%
Summer Study Hall Stipend	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
LETRS Training Stipend	\$ -	\$ -	\$ 65,000	\$ -	\$ 65,000	0.0%
LAND TRUST - Stipends	\$ 1,125	\$ -	\$ -	\$ -	\$ -	0.0%
Special Education Stipends (After School)	\$ 43,904	\$ -	\$ -	\$ -	\$ -	0.0%
COVID 19 Stipend	\$ 3,000	\$ -	\$ -	\$ -	\$ -	0.0%
ESSER II - Stipends	\$ 3,000	\$ -	\$ 12,000	\$ -	\$ 12,000	0.0%
ESSER III - After School Stipends	\$ 58,250	\$ -	\$ 54,000	\$ -	\$ 54,000	0.0%
142 Counselor	\$ 151,048	\$ 41,687	\$ 171,182	\$ 6,000	\$177,182	23.5%
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
143 School Nurse	\$ 2,717	\$ 762	\$ 9,075	\$ -	\$9,075	8.4%
145 Librarian / Literacy Aide	\$ 12,483	\$ 2,825	\$ 23,835	\$ -	\$23,835	11.9%
152 Secretaries	\$ 110,496	\$ 25,187	\$ 121,982	\$ -	\$121,982	20.6%
161 Teacher Aides, Reading Specialists & Subs	\$ 287,163	\$ 61,361	\$ 419,165	\$ -	\$419,165	14.6%
161 LAND TRUST - K Aide/Student Support Para	\$ 30,935	\$ 5,742	\$ 34,000	\$ -	\$ 34,000	16.9%
161 SpEd Aides & Speech Therapist	\$ 127,717	\$ 17,213	\$ 159,398	\$ -	\$159,398	10.8%
162 Computer Aides	\$ 36,595	\$ 5,256	\$ 21,005	\$ -	\$21,005	25.0%
182 Custodial & Maintenance	\$ 110,269	\$ 20,240	\$ 107,917	\$ -	\$107,917	18.8%
191 Lunch Room Aide	\$ 231,425	\$ 47,390	\$ 299,916	\$ 1,822	\$301,738	15.7%
Total 100:	\$ 4,317,510	\$ 1,032,364	\$ 4,853,645	\$ 114,697	\$ 4,968,342	20.8%
200 Employee Benefits						
220 Social Security	\$ 281,966	\$ 69,920	\$ 339,044	\$ 38,550	\$ 377,594	18.5%
LAND TRUST - BENEFITS	\$ 4,574	\$ 439	\$ 2,601	\$ -	\$ 2,601	16.9%
SpEd Social Security	\$ 23,687	\$ 4,101	\$ 29,659	\$ -	\$ 29,659	13.8%
COVID 19 Stipend	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
230 Retirement	\$ 203,879	\$ 48,431	\$ 214,523	\$ -	\$ 214,523	22.6%
240 Group Insurance	\$ 668,982	\$ 115,310	\$ 656,000	\$ -	\$ 656,000	17.6%
240 Deductible Stipend	\$ 15,868	\$ 7,108	\$ 15,000	\$ -	\$ 15,000	47.4%
270 Worker's Compensation Fund	\$ 15,225	\$ 15,461	\$ 16,425	\$ -	\$ 16,425	94.1%
280 Unemployment Insurance	\$ 8,483	\$ -	\$ 13,238	\$ -	\$ 13,238	0.0%
Total 200:	\$ 1,222,664	\$ 260,770	\$ 1,286,490	\$ 38,550	\$ 1,325,040	19.7%
300 Purchased Professional & Technical						
320 Special Education Contractors	\$ 100,505	\$ 7,902	\$ 120,610	\$ -	\$ 120,610	6.6%
320 Counseling Services - (FY20 LCSW-Mental Health)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
330 Employee Training & Development	\$ 32,005	\$ 6,861	\$ 30,000	\$ -	\$ 30,000	22.9%
LAND TRUST - Training & Development	\$ 9,134	\$ -	\$ 24,000	\$ -	\$ 24,000	0.0%
SpEd Training & Development	\$ 1,800	\$ -	\$ -	\$ -	\$ -	0.0%
LETRS Professional Learning Grant PD	\$ -	\$ 48,637	\$ -	\$ 48,637	\$ -	100.0%
330 SEDC Services	\$ -	\$ -	\$ 3,891	\$ -	\$ 3,891	0.0%
340 Audit	\$ 22,070	\$ 11,000	\$ 22,070	\$ -	\$ 22,070	49.8%
345 Business Manager Services	\$ 76,800	\$ 19,584	\$ 78,336	\$ -	\$ 78,336	25.0%
349 Legal Services	\$ 1,638	\$ 70	\$ 15,000	\$ -	\$ 15,000	0.5%
350 Technical Services (IT)	\$ 98,144	\$ 23,934	\$ 101,760	\$ -	\$ 101,760	23.5%
580 Admin & Teacher Travel	\$ 29,004	\$ 8,421	\$ 20,280	\$ -	\$ 20,280	41.5%
LAND TRUST - Travel	\$ 6,538	\$ -	\$ 6,000	\$ -	\$ 6,000	0.0%
SpEd - Travel	\$ 2,621	\$ 1,519	\$ 2,220	\$ -	\$ 2,220	68.4%
Total 300:	\$ 380,259	\$ 127,928	\$ 424,167	\$ -	\$ 472,804	27.1%
400 Purchased Property Services						
411 Water/Sewage	\$ 10,597	\$ 2,447	\$ 12,000	\$ -	\$ 12,000	20.4%
412 Disposal Services	\$ 11,222	\$ 1,701	\$ 13,000	\$ -	\$ 13,000	13.1%
420 Cleaning Services	\$ 2,684	\$ 2,640	\$ 4,000	\$ -	\$ 4,000	66.0%
431 Lawn Care Services	\$ 10,700	\$ 3,830	\$ 12,000	\$ -	\$ 12,000	31.9%
431 Non-Technology Repairs & Maintenance	\$ 31,073	\$ 8,792	\$ 30,000	\$ -	\$ 30,000	29.3%
432 Copy Machine Servicing	\$ 9,145	\$ 1,550	\$ 13,000	\$ -	\$ 13,000	11.9%
Total 400:	\$ 75,421	\$ 20,960	\$ 84,000	\$ -	\$ 84,000	25.0%
500 Other Purchased Services						
522 Property & Liability Insurance	\$ 42,668	\$ 6,960	\$ 45,300	\$ -	\$ 45,300	15.4%
530 Telephone	\$ 10,127	\$ 366	\$ 11,000	\$ -	\$ 11,000	3.3%
540 Marketing	\$ 9,042	\$ 960	\$ 9,000	\$ -	\$ 9,000	10.7%
590 Field Trips / Bus Rental	\$ 100	\$ -	\$ 3,000	\$ -	\$ 3,000	0.0%
Total 500:	\$ 61,937	\$ 8,286	\$ 68,300	\$ -	\$ 68,300	0.0%



	(1013 Students) FY22 Actuals	Current Yr Actuals	(1010 Students) Approved Budget	1000 Changes	Forecast	% of Forecast
600 Supplies and Materials						
610a Classroom Supplies	\$ 50,898	\$ 27,215	\$ 63,000	\$ -	\$ 63,000	43.2%
LAND TRUST - STEM Supplies	\$ 3,227	\$ -	\$ 12,000	\$ -	\$ 12,000	0.0%
LAND TRUST - ESL Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
ESSER II - Supplies	\$ -	\$ -	\$ 17,000	\$ -	\$ 17,000	0.0%
610b Special Ed Supplies	\$ 7,321	\$ 2,714	\$ 10,000	\$ -	\$ 10,000	27.1%
610c Theatre Supplies	\$ 3,334	\$ 722	\$ 4,000	\$ -	\$ 4,000	18.1%
610d CCA Expenses	\$ 7,159	\$ 189	\$ 5,179	\$ -	\$ 5,179	3.6%
610e Student Activity Supplies / Incentives	\$ 9,655	\$ 3,416	\$ 18,000	\$ -	\$ 18,000	19.0%
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
Special Ed Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
610f Board Expenses/meals	\$ 3,393	\$ 2,500	\$ 7,000	\$ -	\$ 7,000	35.7%
610g Office Supplies/General	\$ 24,713	\$ 10,708	\$ 28,000	\$ -	\$ 28,000	38.2%
610h Safety Supplies	\$ 2,322	\$ 2,168	\$ 3,000	\$ -	\$ 3,000	72.3%
610i GWA Gives Back	\$ 5,096	\$ -	\$ -	\$ -	\$ -	0.0%
610j First Aid Supplies	\$ 398	\$ 375	\$ 1,000	\$ -	\$ 1,000	37.5%
610k Principal Discretionary Fund	\$ 9,693	\$ 4,516	\$ 10,000	\$ -	\$ 10,000	45.2%
610l Leadership Flags	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
610m Staff Lounge	\$ 5,570	\$ 2,639	\$ 5,500	\$ -	\$ 5,500	48.0%
610n Swag Store	\$ 4,821	\$ -	\$ -	\$ -	\$ -	0.0%
610o Christmas Party	\$ 4,018	\$ -	\$ 4,018	\$ -	\$ 4,018	0.0%
610p Health and Wellness	\$ 1,793	\$ 221	\$ 4,000	\$ -	\$ 4,000	5.5%
621 Natural Gas	\$ 10,144	\$ 365	\$ 12,500	\$ -	\$ 12,500	2.9%
622 Electricity	\$ 40,467	\$ 13,041	\$ 40,000	\$ -	\$ 40,000	32.6%
630 School Lunch Prgm	\$ 208,598	\$ 50,001	\$ 200,000	\$ -	\$ 200,000	25.0%
641 Textbooks/Curriculum	\$ 26,138	\$ 76,036	\$ 76,081	\$ -	\$ 76,081	99.9%
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
Digital Teaching & Learning Curriculum	\$ 51,395	\$ -	\$ 43,919	\$ 1,917	\$ 45,836	0.0%
644 Library Books	\$ 9,654	\$ 694	\$ 7,000	\$ -	\$ 7,000	9.9%
670 Educational Software	\$ 21,357	\$ 31,736	\$ 26,500	\$ -	\$ 26,500	119.8%
LAND TRUST - Educational Software	\$ 14,501	\$ -	\$ 14,700	\$ -	\$ 14,700	0.0%
SpEd - Educational Software	\$ 1,343	\$ 690	\$ 3,400	\$ -	\$ 3,400	20.3%
ESSER III - Educational Software	\$ 29,360	\$ -	\$ -	\$ -	\$ -	0.0%
680 Maintenance Supplies & Material	\$ 29,619	\$ 9,607	\$ 40,000	\$ -	\$ 40,000	24.0%
ESSER III - Maintenance Supplies	\$ 5,123	\$ -	\$ -	\$ -	\$ -	0.0%
Total 600:	\$ 591,110	\$ 239,553	\$ 655,797	\$ 1,917	\$ 657,714	36.4%
700 Property						
710 Land and Site Improvements & Building	\$ 30,499	\$ 21,880	\$ 25,000	\$ -	\$ 25,000	87.5%
733 Furniture and Fixtures	\$ 15,649	\$ 13,412	\$ 20,000	\$ -	\$ 20,000	67.1%
SpEd - Furniture and Fixtures	\$ -	\$ 1,296	\$ -	\$ -	\$ -	0.0%
734 Technology Hardware	\$ 19,393	\$ 8,520	\$ 2,700	\$ -	\$ 2,700	315.6%
LAND TRUST - Hardware	\$ 50,403	\$ -	\$ 55,000	\$ -	\$ 55,000	0.0%
SpEd - Tech Hardware	\$ 4,485	\$ -	\$ -	\$ -	\$ -	0.0%
ESSER III - Tech Hardware	\$ 332,124	\$ -	\$ -	\$ -	\$ -	0.0%
Digital Teaching & Learning Hardware	\$ -	\$ -	\$ 15,000	\$ -	\$ 15,000	0.0%
736 Technology Software	\$ 46,451	\$ 33,213	\$ 48,000	\$ -	\$ 48,000	69.2%
LAND TRUST - Software	\$ 7,712	\$ -	\$ 5,500	\$ -	\$ 5,500	0.0%
SpEd - Software	\$ 1,600	\$ 1,680	\$ 1,600	\$ -	\$ 1,600	105.0%
739 Kitchen Equipment	\$ 4,168	\$ 23,440	\$ 20,000	\$ 3,440	\$ 23,440	100.0%
790 Cap Ex Fund	\$ 127,067	\$ 15,402	\$ 150,000	\$ 128,603	\$ 278,603	5.5%
Total 700:	\$ 639,551	\$ 118,843	\$ 342,800	\$ 132,043	\$ 474,843	25.0%
800 Debt Service & Miscellaneous						
810 Dues and Fees	\$ 11,165	\$ 6,323	\$ 15,000	\$ -	\$ 15,000	42.2%
830 Bond Restricted Assets (Interest)	\$ 530,913	\$ 139,978	\$ 500,913	\$ -	\$ 500,913	27.9%
840 Bond Restricted Assets (Principal)	\$ 750,000	\$ 181,250	\$ 785,000	\$ -	\$ 785,000	23.1%
833 Bond Fees	\$ 57,240	\$ -	\$ 33,800	\$ -	\$ 33,800	0.0%
890 Miscellaneous	\$ 3,486	\$ -	\$ -	\$ -	\$ -	0.0%
Total 800:	\$ 1,352,804	\$ 327,551	\$ 1,334,713	\$ -	\$ 1,334,713	24.5%
Total Expenses:	\$ 8,641,256	\$ 2,136,255	\$ 9,049,911	\$ 287,207	\$ 9,385,755	22.8%
Net Income:	\$ 1,183,978	\$ 381,626	\$ 258,484	\$ 59,445	\$ 269,292	141.7%
					\$ 250,000	
					\$ 267,351	
					\$ 1,941	
Cap Ex Fund:		At year end: \$ 168,402		Use: \$15,402	At year end: \$ 431,603	
(Unrestricted over \$350,000) Special Project Fund:		Beg of Year \$ 97,843			At year end: \$ 97,843	
Fund Reserve:	\$ 5,841,739		\$ 6,100,223		\$ 6,109,090	



PROPOSAL FOR BOARD ACTION

Proposal Title: TSSA Framework 2022-2023

Submitted by: B.Clark

Sponsoring Committee: N/A

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

Every year we need to create a TSSA Framework that aligns to our schoolwide goals. Here is the framework for this year which needs to be approved.

Background:

Assessment:

Recommendation:

It is the recommendation to approve the TSSA Framework as written.

Please submit this form with all accompanying paperwork to the Board Secretary, Jaycee Rogers, at jrogers@gwacademy.org by the 15th day of the month of the Board meeting.

Teacher Student Success Act Framework



At George Washington Academy we are committed to the success of all students. In the 2022-2023 school year we are focused on improving our overall reading growth for all students. We are committed to a 1-3% increase in the RISE state assessments on average in grades 3-7.

We will achieve this goal by:

- implementing current best practices in teaching strategies as well as technology implementation in all classrooms.
- offering before and after school programs focused on skills where students are deficient.
- integrating contents in a cross-curricular manner using our STEM library and resources.
- focusing on English Language Learners by providing additional support daily for these students.
- offering professional development opportunities focused on Tier 2 instruction as well as collaboration among grade-level teachers and content teams.

Budget Allocations

- GWA may spend up to 30% of its allocation to help with technology purchases in hardware and software for technological implementations (\$58,800)
- GWA may spend up to 5% of the allocation for before/after-school programs in the areas of math and reading for K-7 students (\$9,800)

- GWA may spend up to 20% integrating cross-curricular materials in our STEM Library. (\$39,200)
- GWA may spend up to 10% supporting the increasing population of English Language Learners (\$19,600)
- GWA may spend up to 35% of the allocation supporting teachers with various professional development opportunities. (\$68,600)



PROPOSAL FOR BOARD ACTION

Proposal Title: _____

Submitted by: _____

Sponsoring Committee: _____

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:

Background:

Assessment:

Recommendation:

Please submit this form with all accompanying paperwork to the Board Secretary, Jaycee Rogers, at jrogers@gwacademy.org by the 15th day of the month of the Board meeting.

210 – Paid Time Off (PTO) Policy



Paid Time Off (PTO) provides regular full-time staff members with a benefit of days away from a regularly scheduled work day. PTO Employee Leave Requests should be submitted through the Red Apple Portal at least five (5) days in advance, or as soon as reasonably possible in the event of an illness or emergency. In the case of illness or emergency, employees are requested to contact the school by 6:00AM and required to contact the school *at least* one (1) hour before their shift begins. For absence other than PTO such as bereavement, jury duty, military service, or family medical leave (FMLA), refer to the separate policies regarding the same.

For purposes of PTO, a school year shall be the Letter of Employment period.

ELIGIBILITY AND BENEFIT OVERVIEW:

Regular Full-Time, Teaching Employees (Salary; Exempt)

Employees within this classification eligible for medical benefits (regularly scheduled 30 hours per week) will be granted ~~five (5)~~ eight (8) days per School Year of PTO for 1.0 FTE employees. Employees working between 0.75 – 0.99 FTE will receive ~~4~~ six (6) days per school year. These days will be given on the first day of the year (~~August~~ July 1st). PTO must be used in half-day (4 hours minimum) increments. ~~Any~~ At the end of the school year an employee may elect to ~~unused PTO days remaining at the end of a School Year will~~ be paid out at a rate of 1/200th of the employee's annual salary per unused day (8 hour block) for up to two (2) days, less all applicable withholdings and taxes. ~~;~~ however, a An employee may also elect to carry-over up to two (2) days of PTO, thus, creating a PTO bank ("Bank"). An employee's current School Year PTO days plus his/her Bank shall not exceed ~~seven (7)~~ ten (10) days of PTO. Upon the voluntary or involuntary termination of employment during a School Year, the PTO days will be prorated and rounded down to the nearest half-day. Days missed beyond the granted ~~five (5)~~ eight (8) days per school year plus the Bank, if any, will be deducted at 1/200th of the employee's annual salary, including any legislative increase provided. In the event that PTO days used are greater than the prorated number of available PTO days the "negative days" will be subtracted during the final salary reconciliation (please see "Salary Reconciliation Policy"). ~~Unused PTO days after proration will be paid out at a rate of 1/200th of the employee's annual salary per unused day (8 hour block), less all applicable withholdings and taxes.~~ -(The PTO Vesting Schedule is not applicable to this job classification.)

Regular Full-Time, Non-Teaching Employees (Salary; Exempt) **

Employees within this classification eligible for medical benefits (regularly scheduled 30 hours per week) will be granted PTO as approved by the Board of Directors. These days will be given on the Letter of Employment start date. Any unused PTO days remaining at the end of a School Year will not be paid out; however, an employee may elect to carry-over any unused PTO, thus, creating a PTO bank ("Bank"). An employee's PTO Bank shall never exceed 150% of his/her annual PTO benefit. Should an employee exceed said PTO hours, any excess will be forfeited forever and shall not be paid out. Upon the voluntary or involuntary termination of employment during a School Year, the PTO days will be prorated and rounded down to the nearest half-day. In the event that PTO days used are greater than the prorated number of available PTO days the "negative days" will be subtracted during the final salary reconciliation (please see "Salary Reconciliation Policy"). Upon the voluntary or involuntary termination of employment, an employee's unused PTO will be paid out based on the date of separation, employee's then current daily rate of pay, and PTO Vesting Schedule.

210 – Paid Time Off (PTO) Policy (cont.)

Regular Full-Time, Full-Year, Non-Teaching Employees (Hourly; Non-Exempt)

Employees within this classification eligible for medical benefits (regularly scheduled 30 hours per week) will be granted three and one-third (3 1/3) hours of PTO per each of the twenty-four (24) pay periods, per School Year. Any unused PTO days remaining at the end of a School Year will not be paid out; however, an employee may carry-over any unused PTO, thus, creating a PTO bank (“Bank”). An employee’s PTO Bank shall never exceed 150% of his/her annual accrual. Should an employee exceed said PTO hours, any excess will be forfeited forever and shall not be paid out. Upon the voluntary or involuntary termination of employment, an employee’s unused PTO will be paid out based on the date of separation, employee’s then current daily rate of pay, and PTO Vesting Schedule.

Regular Full-Time, Partial-Year, Non-Teaching Employees (Hourly; Non-Exempt)

Employees within this classification eligible for medical benefits (regularly scheduled 30 hours per week) will be granted two (2) hours of PTO per each of the twenty (20) pay periods, per School Year. Any unused PTO days remaining at the end of a School Year will not be paid out; however, an employee may carry-over unused PTO, thus, creating a PTO bank (“Bank”). An employee’s PTO Bank shall never exceed 150% of his/her annual accrual. Should an employee exceed said PTO hours, any excess will be forfeited forever and shall not be paid out. Upon the voluntary or involuntary termination of employment, an employee’s unused PTO will be paid out based on the date of separation, employee’s then current daily rate of pay, and PTO Vesting Schedule.

Regular Part-Time, Teaching Employees (Hourly; Non-Exempt)

Employees within this classification will not be eligible for PTO.

Regular Part-Time, Non-Teaching Employees (Hourly; Non-Exempt)

Employees within this classification will not be eligible for PTO.

Temporary, Teaching and Non-Teaching Employees

Employees within this classification, whether eligible for medical and/or 401k benefits or not will not be eligible for PTO.

ADDITIONAL PTO GUIDELINES FOR ALL EMPLOYEES:

- “No pay,” for regularly scheduled work hours, is not an option if the employee has a PTO balance. Absences taken in excess of allowed/accrued PTO may result in disciplinary action up to and including termination. This time will be unpaid.
- An employee who does not work all of his/her regularly scheduled hours during a work week is required to use PTO to reach that employees normal hours worked during a work week, unless the reason for the reduction in hours is due to lack of work, in which case use of PTO to reach the standard weekly hours is at the option of the employee.
- Any employee who misses three consecutive days of work without notice to their supervisor may be considered to have voluntarily quit their job.
- Employees who miss more than three consecutive unscheduled days may be required to present a doctor’s release to the Personnel Administrative Assistant.
- Employees who give notice of employment termination during the period defined in their employment offer must work the duration of the notice without utilizing PTO unless previously approved by the

210 – Paid Time Off (PTO) Policy (cont.)

Executive Director or Board of Directors. An employee who does not work through the notice period, or give formal notice, will forfeit their PTO balance.

- PTO cannot be scheduled or taken before it is accrued and approved.
- An employee who is eligible for PTO, who quits or is terminated and then is re-hired at a future date, will start at the beginning of the PTO schedule unless an exception is made by the Executive Director or Board of Directors.
- Exceptions to the PTO usage as described in this policy are allowed only by the Executive Director.
- Employees are responsible for monitoring their PTO over the course of the school year. An employee will not be allowed to exceed the maximum PTO allowance.
- **PTO Vesting Schedule:** Upon the voluntary or involuntary termination of employment, employees will be paid their earned PTO based on their date of separation, their daily rate of pay, and this PTO Vesting Schedule. This vesting schedule is 0% **during** the first year, then 20% per **completed** year to achieve 100% vesting following 5 full years of full time (benefits eligible) continuous employment. Note: The PTO Vesting Schedule does not apply to the Regular Full-Time Teaching classification and Regular Full-Time Non-Teaching Employees (Salary and Temporary Support classification.).
- PTO has no cash value except as designated at termination

DONATION OF PTO:

All eligible employees will be allowed to donate PTO time from their unused balance to their co-workers in need in accordance with the policy outlined below. This policy is strictly voluntary.

Guidelines: Employees who would like to make a formal request to receive donated sick/personal time from their co-workers must complete the GWA “Release of Information for Leave Donation Request” form and have a situation that meets the following criteria:

- **Family Health Related Emergency** – Critical or catastrophic illness or injury of the employee or an immediate family member. Immediate family member is defined as spouse, child, parent, sibling, grandparent, in-law equivalent, or other relationship in which the employee is the legal guardian or sole caretaker.
- **Other Personal Crisis** – A personal crisis of a severe nature that directly impacts the employee. This may include a natural disaster impacting the employee’s primary residence such as a fire or severe storm.

Employees who donate PTO from their unused balance must complete a GWA “Leave Donation Release Form” and adhere to the following requirements:

- Donation minimum – 4 hours (1/2 day), as determined by job classification
- Donation maximum – no more than 50% of employee’s current PTO balance

Note: Employees who donate time must have sufficient time in their balance and will not be permitted to exhaust their balances due to the fact that they may experience their own personal need for time off. Employees cannot borrow against future PTO to donate.

- Employees who receive donated PTO may receive no more than fifteen (15) days within a school year
- Employees who are currently on an approved leave of absence cannot donate PTO

Procedure

- Employees who would like to make a request to receive donated PTO time are required to complete a GWA “Release of Information for Leave Donation Request” form (available from the Personnel

210 – Paid Time Off (PTO) Policy (cont.)

Administrative Assistant) to allow GWA to present their request to the employees of George Washington Academy for the sole purpose of soliciting donations.

- Employees who wish to donate PTO time to a co-worker in need must complete a “Leave Donation Release Form,” (available from the Personnel Administrative Assistant).
- All forms must be returned to the Personnel Administrative Assistant for processing as soon as possible.

Approval

- Requests for donations of PTO must be approved by the Executive Director
- If the recipient employee has available PTO time in their balance, this time will be used prior to any donated PTO time. Donated PTO may only be used for time off related to the approved request. PTO donations will be recorded and used in the order received, taking one day from each donor before taking more than one from a single donor. PTO time donated that is in excess of the time off needed will be returned to the donor.



PROPOSAL FOR BOARD ACTION

Proposal Title: _____

Submitted by: _____

Sponsoring Committee: _____

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

Situation:


Background:


Assessment:

Recommendation:

Please submit this form with all accompanying paperwork to the Board Secretary, Jaycee Rogers, at jrogers@gwacademy.org by the 15th day of the month of the Board meeting.

Current Employees Covered on Plan 2023 8% Increase

 2023 Renewal Rates \$4,500/\$9000 H.S.A Plan					
Contract Type	Subscribers	Rates	GWA Portion	Employee Portion	Total
Employee Only	17	\$567.90	\$454.32	\$113.58	\$9,654.30
Two-Party	7	\$1,247.00	\$997.60	\$249.40	\$8,729.00
Family	20	\$1,760.50	\$1,408.40	\$352.10	\$35,210.00
Total	44		\$42,874.64	\$10,718.66	\$53,593.30

 2022 Current Rates \$4,500/\$9,000 H.S.A Plan 5% Increase					
Contract Type	Subscribers	Rates	GWA Portion	Employee Portion	Total
Employee Only	15	\$525.80	\$420.64	\$105.16	\$7,875.00
Two-Party	8	\$1154.60	\$923.68	\$230.92	\$9,236.80
Family	25	\$1630.10	\$1,304.80	\$325.30	\$40,752.50
Total	48		\$46,291.44	\$11,572.86	\$57,864.30
Annual Premium = \$694,371.60					

2023 SelectHealth Rate Breakdown

- GWA Employer Contribution 80%
- Current Enrollments of 44 Employees enrolled 6 waving coverage
- Out of Pocket is Embedded
- Contributions into Employee HSA Accounts \$2,000

SelectHealth Current & Renewal HSA Plan

\$4,500/\$9000 Deductible

\$6,900/\$13,800 OOP



George Washington Academy

proposal - option 1-Revised

Proposal Assumptions

Medical Rates and Payment Summaries

Standard Dental Options

Vision Options

Valuable Programs & Services



DD/PB



Proposal Assumptions (Sole Carrier) EFFECTIVE 01/01/23 THROUGH 12/31/23

This proposal is made on the basis of information provided to SelectHealth and is subject to the above criteria as well as properly completed group and membership applications. Applications are to be submitted to and approved by SelectHealth Underwriting before the proposed effective date. Otherwise, SelectHealth may choose to delay the effective date.

This proposal assumes benefits are paid according to the Group Health Insurance contract and standard operating procedures of SelectHealth. No deviations or exceptions are expected. Any exception must be approved prior to the group's effective date.

MINIMUM PARTICIPATION AND CONTRIBUTION REQUIREMENTS

Failure to comply with any of the following requirements may result in corrective underwriting actions according to the terms outlined in the master group contract.

- Employer contributions must be at least 90% of the employee cost or 50% across all tiers.
- 75% of eligible employees must participate in an employer sponsored health plan.
- Employer may not incentivize employees to not elect coverage.
- The number of out-of-area participants may not exceed 40% of the group's enrolled employees.

UNDERWRITING ASSUMPTION REQUIREMENTS

- Eligible Employees: 59
- If enrollment differs by more than 15% during the contract year, SelectHealth reserves the right to reevaluate rates and plan designs.
- Confirmation and notification of renewal plan and rates must be received by SelectHealth by the first day of the month prior to renewal. If confirmation is not received by the first day of the prior month, SelectHealth will automatically assume Option 1 was selected.

EMPLOYEE ELIGIBILITY REQUIREMENT

- Eligible employees include permanent full-time personnel (hourly and salaried) working 30 hours or more per week who reside within the plan's service area(s). Retirees are excluded.
- Newly hired eligible employees who enroll within the Initial Eligibility Period of 31 days will be covered on the 1st of the next calendar month following 30 s.
- Coverage will terminate at the end of the calendar month in which subscriber and/or dependents lose eligibility.
- Covered dependents will not be removed from the subscriber's policy for any reason other than reaching age 26, or upon the request of the subscriber. Coverage will be terminated at the end of the month in which the dependent child turns 26.

EXPECTED EMPLOYER MINIMUM MONTHLY CONTRIBUTION

Employee	80%
Two-Party	80%
Family	80%



Medical Plan Option 1-Revised
EFFECTIVE 01/01/23 THROUGH 12/31/23

	Med Network	Med Network
	<u>Current</u>	<u>Proposed</u>
Employee	\$525.80	\$567.90
Two-Party	\$1,154.60	\$1,247.00
Family	\$1,630.10	\$1,760.50

Renewal Increase 8%

1. We may reasonably modify the premium if federal or state laws or regulations mandate that we adjust benefits under the Contract.
2. This proposal (and associated premium rates) has been calculated based on the following commission/service fee arrangement as proposed by the submitting agent: 2.5% Commission.
3. An additional fee of \$2.00 pepm will be billed when an HSA Qualified plan is paired with a HealthEquity HSA.
4. Please provide a client signature on the sold rate sheet and initial the correlating Member Payment Summaries. Note: Member materials will not be generated until rates, plan designs and commissions are confirmed.

Client Signature _____ Date _____



MEMBER PAYMENT SUMMARY	
IN-NETWORK	OUT-OF-NETWORK
When using In-Network Providers, you are responsible to pay the amounts in this column.	When using Out-of-Network Providers, you are responsible to pay the amounts in this column.

CONDITIONS AND LIMITATIONS		
Lifetime Maximum Plan Payment - <i>Per Person</i>	None	
Pre-Existing Conditions (PEC)	None	
Benefit Accumulator Period	calendar Year	
Maximum Annual Out-of-Network Payment - (per calendar Year)	None	None
MEDICAL DEDUCTIBLE AND MEDICAL OUT-OF-POCKET ^{5,6}	IN-NETWORK	OUT-OF-NETWORK
Self Only Coverage, 1 person enrolled - per calendar Year		
Deductible	\$4,500	\$4,750
Out-of-Pocket Maximum	\$6,900	\$8,350
Family Coverage, 2 or more enrolled - per calendar Year		
Deductible	\$9,000	\$9,500
Out-of-Pocket Maximum - per person/family	\$6900/\$13800	\$8350/\$16700
(Medical and Pharmacy Included in the Out-of-Pocket Maximum)		
INPATIENT SERVICES	IN-NETWORK	OUT-OF-NETWORK
Medical, Surgical and Hospice ⁴	20% after Deductible	40% after Deductible
Hospital Level Care at Home ⁴	20% after Deductible	Not Covered
Skilled Nursing Facility ⁴ - Up to 60 days per calendar Year	20% after Deductible	40% after Deductible
Inpatient Rehab Therapy: Physical, Speech, Occupational ⁴ Up to 40 days per calendar Year for all therapy types combined	20% after Deductible	40% after Deductible
Physician's Fees - (Medical, Surgical, Maternity, Anesthesia)	20% after Deductible	40% after Deductible
PROFESSIONAL SERVICES	IN-NETWORK	OUT-OF-NETWORK
Office Visits & Minor Office Surgeries		
Primary Care Provider (PCP) ¹	\$15 after Deductible	40% after Deductible
Primary Care Provider (PCP) Virtual Visits ¹	Covered 100% after Deductible	Not Covered
Specialist/Secondary Care Provider (SCP) ¹	\$25 after Deductible	40% after Deductible
Allergy Tests	See Office Visits Above	Not Covered
Allergy Treatment and Serum	20% after Deductible	Not Covered
Major Surgery	20% after Deductible	40% after Deductible
Physician's Fees - (Medical, Surgical, Maternity, Anesthesia)	20% after Deductible	40% after Deductible
PREVENTIVE SERVICES AS OUTLINED BY THE ACA ^{2,3}	IN-NETWORK	OUT-OF-NETWORK
Primary Care Provider (PCP) ¹	Covered 100%	Not Covered
Specialist/Secondary Care Provider (SCP) ¹	Covered 100%	Not Covered
Adult and Pediatric Immunizations	Covered 100%	Not Covered
Elective Immunizations - herpes zoster (shingles), rotavirus	Covered 100%	Not Covered
Diagnostic Tests: Minor	Covered 100%	Not Covered
Other Preventive Services	Covered 100%	Not Covered
VISION SERVICES	IN-NETWORK	OUT-OF-NETWORK
Preventive Eye Exams	Covered 100%	Not Covered
All Other Eye Exams	\$25 after Deductible	40% after Deductible
OUTPATIENT SERVICES ⁴	IN-NETWORK	OUT-OF-NETWORK
Outpatient Facility	20% after Deductible	40% after Deductible
Ambulatory Surgical Center	20% after Deductible	40% after Deductible
Imaging Center	20% after Deductible	40% after Deductible
Ambulance (Air or Ground) - <i>Emergencies Only</i>	20% after Deductible	See In-Network Benefit
Emergency Room	\$75 after Deductible	See In-Network Benefit
Intermountain InstaCare [®] Facilities, Urgent Care Facilities	\$35 after Deductible	40% after Deductible
Intermountain KidsCare [®] Facilities	\$15 after Deductible	Not Available
Intermountain Connect Care [®]	Covered 100% after Deductible	Not Available
Radiation	20% after Deductible	40% after Deductible
Dialysis	20% after Deductible	40% after Deductible
Diagnostic Tests: Minor ²	Covered 100% after Deductible	40% after Deductible
Diagnostic Tests: Major ²	20% after Deductible	40% after Deductible
Home Health, Hospice, Outpatient Private Nurse	20% after Deductible	40% after Deductible
Outpatient Cardiac Rehab	Covered 100% after Deductible	40% after Deductible
Outpatient Rehab/Habilitative Therapy: Physical, Speech, Occupational	\$25 after Deductible	40% after Deductible



MEMBER PAYMENT SUMMARY	
IN-NETWORK	OUT-OF-NETWORK

MISCELLANEOUS SERVICES	IN-NETWORK	OUT-OF-NETWORK
Durable Medical Equipment (DME) ⁴	20% after Deductible	40% after Deductible
Miscellaneous Medical Supplies (MMS) ³	20% after Deductible	40% after Deductible
Autism Spectrum Disorder	See Professional, Inpatient, Outpatient, or Mental Health and Chemical Dependency Services	See Professional, Inpatient, Outpatient, or Mental Health and Chemical Dependency Services
Maternity and Adoption ^{4,7}	See Professional, Inpatient or Outpatient	40% after Deductible
Cochlear Implants or Auditory Osseointegrated Devices ^{2,4} <i>One device every 36 months per ear</i>	See Professional, Inpatient or Outpatient	Not Covered
Infertility - <i>Select Services</i>	50% after Deductible	Not Covered
TMJ (Temporomandibular Joint) Services - <i>Up to \$2,000 lifetime</i>	See Professional, Inpatient or Outpatient	Not Covered
OPTIONAL BENEFITS	IN-NETWORK	OUT-OF-NETWORK
Mental Health and Chemical Dependency ⁴		
Office Visits	\$15 after Deductible	40% after Deductible
Virtual Visits	Covered 100% after Deductible	40% after Deductible
Inpatient	20% after Deductible	40% after Deductible
Outpatient	20% after Deductible	40% after Deductible
Residential Treatment ²	20% after Deductible	40% after Deductible
Chiropractic <i>(up to 20 visits per calendar Year)</i>	\$15 after Deductible	Not Covered
Injectable Drugs, Chemotherapy, and Specialty Medications ⁴	20% after Deductible	40% after Deductible
Bariatric Surgery <i>(Up to one surgery/lifetime)</i> ⁴	See Professional, Inpatient or Outpatient	Not Covered
PRESCRIPTION DRUGS		
Prescription Drug List (formulary)	RxSelect [®]	
Prescription Drugs- <i>Up to 30 Day Supply of Covered Medications</i> ⁴		
Tier 1	\$7 after In-Network Deductible	
Tier 2	\$21 after In-Network Deductible	
Tier 3	\$42 after In-Network Deductible	
Tier 4	\$100 after In-Network Deductible	
Maintenance Drugs- <i>90 Day Supply (Mail-Order,Retail90[®])-selected drugs</i> ⁴		
Tier 1	\$7 after In-Network Deductible	
Tier 2	\$42 after In-Network Deductible	
Tier 3	\$126 after In-Network Deductible	
Generic Substitution Required	Generic required or must pay Copay plus cost difference between name brand and generic	

1 Refer to selecthealth.org/findadoctor to identify whether a Provider is a primary or secondary care Provider.

2 Refer to your Certificate of Coverage for more information.

3 Frequency and/or quantity limitations apply to some Preventive care and MMS Services.

4 Preauthorization is required for certain Services. Benefits may be reduced or denied if you do not preauthorize certain Services with Out-of-Network Providers. Please refer to Section 11--" Healthcare Management", in your Certificate of Coverage, for details.

5 **All Deductible/Copay/Coinsurance amounts are based on the Allowed Amount and not on billed charges. Out-of-Network Providers or Facilities may not accept the Allowed Amount for Covered Services. When this occurs, you may be responsible for Excess Charges.**

6 Certain Services as noted on this document and in your Certificate of Coverage are not subject to the Deductible.

7 SelectHealth provides a \$4000 adoption indemnity as outlined by the state of Utah. Medical Deductible, Copay, or Coinsurance listed under the benefit applies and may exhaust the benefits prior to any plan payments.

All Covered Services obtained outside the United States, except for routine, Urgent, or Emergency conditions require preauthorization.
 To contact Member Services, call 800-538-5038 weekdays, from 7:00 a.m. to 8:00 p.m., Saturdays, from 9:00 a.m. to 2:00 p.m. TTY users should call 711.

Benefits are administered and underwritten by SelectHealth, Inc. SM (domiciled in Utah).



Standard Dental Plan Options

EFFECTIVE 01/01/23 THROUGH 12/31/23

OPTION A		
CLASSIC NETWORK	Participating	Non-participating
DEDUCTIBLE (per person/per family)	\$50/\$150	
ANNUAL MAXIMUM (per person)	\$1000	
PREVENTIVE AND DIAGNOSTIC (includes space maintainers and sealants)	Covered 100%	Covered 100%*
BASIC (includes endodontic and periodontal)	20% after deductible	20% after deductible*
MAJOR (includes implants)	50% after deductible	50% after deductible*
ORTHODONTIC	Not covered	
Employee	\$40.50	
Employee & Spouse	\$88.90	
Employee & Child	\$88.90	
Employee & Children	\$125.40	
Family	\$125.40	

OPTION B	
OUT OF AREA	Any Provider
DEDUCTIBLE (per person/per family)	\$50/\$150
ANNUAL MAXIMUM (per person)	\$1000
PREVENTIVE AND DIAGNOSTIC (includes space maintainers and sealants)	Covered 100%*
BASIC (includes endodontic and periodontal)	20% after deductible*
MAJOR (includes implants)	50% after deductible*
ORTHODONTIC	Not covered
Employee	\$44.40
Employee & Spouse	\$97.40
Employee & Child	\$97.40
Employee & Children	\$137.50
Family	\$137.50

OPTION C		
CLASSIC NETWORK	Participating	Non-participating
DEDUCTIBLE (per person/per family)	\$50/\$150	
ANNUAL MAXIMUM (per person)	\$1000	
PREVENTIVE AND DIAGNOSTIC (includes space maintainers and sealants)	Covered 100%	Covered 100%*
BASIC (includes endodontic and periodontal)	20% after deductible	20% after deductible*
MAJOR (includes implants)	50% after deductible	50% after deductible*
ORTHODONTICS (For dependent children up to age 20)	50%	50%*
LIFETIME ORTHODONTIC	\$1500	
Employee	\$43.90	
Employee & Spouse	\$96.30	
Employee & Child	\$96.30	
Employee & Children	\$135.90	
Family	\$135.90	

OPTION D	
OUT OF AREA	Any Provider
DEDUCTIBLE (per person/per family)	\$50/\$150
ANNUAL MAXIMUM (per person)	\$1000
PREVENTIVE AND DIAGNOSTIC (includes space maintainers and sealants)	Covered 100%*
BASIC (includes endodontic and periodontal)	20% after deductible*
MAJOR (includes implants)	50% after deductible*
ORTHODONTICS (For dependent children up to age 20)	50%*
LIFETIME ORTHODONTIC	\$1500
Employee	\$47.70
Employee & Spouse	\$104.80
Employee & Child	\$104.80
Employee & Children	\$148.00
Family	\$148.00

* Members may be responsible for excess charges not covered by the Plan when receiving services from a nonparticipating dental provider. Excess charges are amounts exceeding eligible charges for covered services.

1. These rates assume a SelectHealth Medical Plan is offered.
2. This offering is considered Contributory (90% of the single rate or 50% of all tiers)
3. This proposal has been calculated based on the following commission arrangement: 7.5% flat
4. If no options are selected and page is not signed, dental will not be considered part of the sold offering

Option(s) selected (please initial): Option A ____ Option B ____ Option C ____ Option D ____

Client Signature _____ Date _____



SelectHealth EyewearSM Options

EFFECTIVE 01/01/23 THROUGH 12/31/23

SelectHealth Eyewear plans provide coverage for vision hardware, including contacts, frames, lenses, and lens treatments. These plans are administered by EyeMed Vision Care[®]. Services are available at 23,000 locations nationwide through EyeMed's Access network.

	Option A	Option B	Option C
	Member Cost	Member Cost	Member Cost
Frames: Any available frame at provider location	\$100 allowance*	\$150 allowance*	\$200 allowance*
Standard Plastic Lenses: Single Vision, Bifocal, Trifocal	\$10 Copay	\$20 Copay	\$25 Copay
Contact Lenses: Conventional, Disposable	\$115 allowance*	\$150 allowance*	\$200 allowance*
Medically Necessary	\$0 Copay, Paid-in-Full	\$0 Copay, Paid-in-Full	\$0 Copay, Paid-in-Full
Contributory			
Employee	\$4.20	\$4.60	\$5.40
Employee + 1 Dependent	\$8.00	\$8.70	\$10.30
Family	\$15.60	\$17.10	\$20.00
Voluntary			
Employee	\$5.50	\$6.30	\$7.40
Employee + 1 Dependent	\$10.50	\$12.00	\$14.10
Family	\$20.40	\$23.40	\$27.50

	Option D	Option E
	Member Cost	Member Cost
Frames: Any frames, lens and lens options available at provider location	\$200 Allowance*	\$300 Allowance*
Contact Lenses: Conventional, Disposable		
Medically Necessary	\$0 Copay, Paid-in-Full	\$0 Copay, Paid-in-Full
Contributory		
Employee	\$6.30	\$8.70
Employee + 1 Dependent	\$12.00	\$16.50
Family	\$23.40	\$32.30
Voluntary		
Employee	\$8.60	\$12.10
Employee + 1 Dependent	\$16.30	\$23.00
Family	\$31.90	\$44.90

Members will receive a lower level of benefits when using nonparticipating providers.

* An allowance may be used for glasses or contact lenses, not both. For cases in which an allowance has been exceeded, a discount will apply.

If the employer pays 80 percent or more of the premium the plan is considered contributory. Otherwise, the plan is considered voluntary.



It all starts with one good choice. Here's seven reasons to make SelectHealth your partner for better health.

1. RANKINGS AND NETWORKS

The National Committee for Quality Assurance has ranked us as Utah's top health plan for the past six years.* Integration with Intermountain Healthcare® means that our members have access to some of the best hospitals, clinics, and doctors in the state.

*According to NCQA's Private Health Insurance Plan Rankings, 2013–2014

2. WORKING TO LOWER HEALTHCARE COSTS

Since many of our network doctors, providers, and hospitals support the same best practices and data-driven approach to healthcare that we do, our partnership drives innovation, efficiency, convenience, and lower costs. We can keep costs down by sharing data and identifying the most effective clinical practices.

Performance-based pay or “quality incentive” is a payment model that rewards caregivers for quality and efficiency. Our program gives doctors a financial incentive to achieve evidence-based benchmarks for primary care and the treatment of many common diseases. It also provides financial disincentives for unnecessary tests or procedures. Working with Intermountain Healthcare means more doctors and facilities participate in our quality incentive program, reducing costs and improving care.

Our members play a part, too, by seeking care in appropriate places, living healthy lifestyles, and following their doctor's prescribed treatments. This approach is called Shared Accountability, and it is helping us achieve the Triple Aim of better health, better care, and more predictable costs.

3. EXCELLENT PRESCRIPTION DRUG COVERAGE

SelectHealth Prescriptions® offers benefits at over 39,000 participating pharmacies and preferred pricing at many area pharmacies. Developed by physicians and pharmacists with years of clinical expertise, our formularies and pharmacy edits reduce prescription costs and support our generic dispensing rate of 84 percent, which is higher than the national average.

We don't employ pricing spreads. Instead we use a pass-through pricing model with no hidden fees or marked-up rates. This means our contracted rates with participating pharmacies are the same rates you will pay for prescription drugs.

Our online tools are designed to empower members to save money on prescription drugs. Members can see how different drugs are covered, how much they cost, and whether there are lower-cost generic alternatives available.

4. EXCEPTIONAL SERVICE

Our award-winning customer service team strives to resolve concerns on the first call. Representatives answer members' questions about claims or benefits - with extended weekday and Saturday hours. In addition, SelectHealth Member Advocates® help members find the right doctor for their needs. They will schedule appointments and help members find the closest or most appropriate facility or doctor.

While observing the highest standards of member privacy, our team has unique access to real-time clinical data about hospital admissions, emergency room visits, prescriptions, physician notes, and test results. We evaluate the data to promote cost-effective outcomes and ensure quality. This reduces unnecessary or duplicative procedures.

5. HELPING PEOPLE GET HEALTHY

Partner with SelectHealth to include our Healthy Living product in your workplace program to establish a culture of wellness. We combine employer consultations, an online community, and health education to engage your employees in adopting behaviors that support their well-being.

6. ADVANCED DIGITAL TOOLS

The SelectHealth member account, our secure member website, provides important health and benefit information 24 hours a day, seven days a week. Also, the new Intermountain Mobile App makes managing health easier. It offers many features designed to simplify the healthcare experience, including the ability to view lab results, get in line at an Instacare®, and view member ID Cards.

7. CONTRIBUTING TO A HEALTHIER COMMUNITY

From sponsoring the GREENbike program in Salt Lake City to helping elementary school kids stay active through programs like STEP Express, SelectHealth is invested in our community's health. Additionally, our Select 25 program awards \$2,500 each to 25 nonprofit organizations that encourage healthy behaviors or serve populations with special needs. And last year alone, 36,610 people attended our 244 free health fair events.



Fully Insured 2023 Policy Updates

The following items are being communicated for informational purposes. If you have any questions or concerns, please contact your SelectHealth Account Manager.

1. **New SelectHealth Chiropractic Network**

Effective upon group renewal as of January 1, 2023 and thereafter, SelectHealth plans will utilize a new chiropractic network instead of the previous network offered through American Specialty Health (ASH). The standard offering included for no additional premium is 20 visits per person, per year and will match the Primary Care Provider (PCP) benefit on the Member Payment Summary. Preauthorization will no longer be required. This benefit will be included on all Large Employer traditional plans and Qualified High Deductible Health Plans (QHDHPs). Additional visits or different copays may be available upon request through your agent/consultant or SelectHealth sales representative.

Rationale

SelectHealth has developed a comparable network as previously offered through ASH, which allows SelectHealth to administer a chiropractic benefit without the necessity of third-party involvement.

2. **Dental Anesthesia**

Effective upon group renewal in Utah and Nevada as of January 1, 2023 and thereafter, coverage for dental anesthesia under medical plan benefits may be approved when rendered at an in-network facility or dental office when preauthorization is obtained. Previously, SelectHealth only covered these services when rendered in a facility.

Effective upon group renewal in Idaho as of January 1, 2023 and thereafter, coverage for dental anesthesia under medical plan benefits may be approved when rendered at a facility or dental office when preauthorization is obtained.

Rationale

This new policy that will be managed through preauthorization, allows for more appropriate care in the most appropriate care setting.

3. **Orthodontia Lifetime Maximum Plan Payment for SelectHealth Dental Plans – Utah plans only**

Effective upon group renewal as of January 1, 2023 and thereafter, prior orthodontia treatment and services received through another dental carrier or a SelectHealth dental plan through a different employer, will not be applied to the orthodontia lifetime maximum plan payment.

Rationale

The new policy is intended to eliminate member confusion regarding their orthodontia benefit being limited previously when enrolling on a new dental plan with SelectHealth.

4. **Hospital Level Care at Home, Ambulatory Surgical Centers and Imaging Centers – Utah plans only**

Effective upon group renewal in Utah as of January 1, 2023 and thereafter, Hospital level care at home, Ambulatory Surgical Center and Imaging Center benefits will appear on the Member Payment Summary.

Rationale

To assist members in navigation to appropriate care and lowest available pricing, these services will appear on the Member Payment Summary.



George Washington Academy

Renewal Reports

**Medical Expense Overview
Top 25 Pharmacy Utilization
Pharmacy Utilization Summary**



Utilization Summary

George Washington Academy

June, 2021 to May, 2022

SelectHealth has examined the following benefit categories and assigned a ranked order to offer guidance on controlling health care expense. The rankings are based upon logic that looks at per member per month expense, utilization and expense per encounter. The expense and utilization are compared to benchmarks to determine abnormalities and then they are ranked to illustrate the categories where focused interventions will have the strongest impact.

After the benefit categories have been ranked additional information is provided as to the cost of the category. The options are as follows:

Utilization: These are categories where the visits or encounters are driving the cost of the Category. Typically these categories respond well to benefit modifications.

Expense: These categories are driven by high cost. Many times this is an indication of more intense services that may not improve with benefit modifications.

Utilization & Expense: These categories are driven by both high utilization and expense. Typically these categories can be improved by benefit modifications.

Ranked Category	Expense Description
1) Inpatient	Above benchmark due to utilization
2) Outpatient	Above benchmark due to expense
3) Specialty Care Physician	Above benchmark due to utilization
4) Pharmacy	Acceptable levels
5) Emergency Room	Acceptable levels
6) Maternity	Acceptable levels
7) InstaCare	Above benchmark due to expense
8) Primary Care Physician	Acceptable levels

Note: This report does not include any data from the NationCare product (if applicable).

Top 25 Pharmacy Utilization (Sorted by Percent of Scripts)

George Washington Academy

June, 2021 to May, 2022

Drug Name (Therapeutic Class)	Drug Tier	Percent of Scripts	Percent of Total Paid	Relationship to Benchmark
1 Pfizer-biontechCovid-19 (Vaccines)	2	2.5%	0.7%	Even
2 BupropionHydrochlorideE (Miscellaneous Antidepressants)	1	2.2%	0.1%	Below
3 QuetiapineFumarate (Atypical Antipsychotics)	1	2.1%	0.2%	Above
4 HydromorphoneHcl (Opiate Agonists)	1	2.1%	0.1%	Above
5 Buprenorphine (Opiate Partial Agonists)	1	2.1%	1.9%	Above
6 SertralineHydrochloride (Selective Serotonin-Reuptake Inhibi	1	2.1%	0.0%	Even
7 LevothyroxineSodium (Thyroid Agents)	1	1.9%	0.0%	Below
8 Lisinopril (Angiotensin-Converting Enzyme Inhibitors)	1	1.9%	0.0%	Below
9 Gabapentin (Anticonvulsants, Miscellaneous)	1	1.8%	0.1%	Even
10 HydrocodoneBitartrate/ac (Opiate Agonists)	1	1.8%	0.2%	Above
11 MontelukastSodium (Leukotriene Modifiers)	1	1.7%	0.0%	Below
12 Methocarbamol (Centrally Acting Skeletal Muscle Relaxants)	1	1.6%	0.1%	Above
13 Ibuprofen (Other Nonsteroidal Anti-Inflammatory Agents)	1	1.6%	0.1%	Above
14 AtorvastatinCalcium (Hmg-Coa Reductase Inhibitors)	1	1.5%	0.2%	Above
15 Amoxicillin (Aminopenicillins)	1	1.4%	0.0%	Below
16 FluoxetineHcl (Selective Serotonin-Reuptake Inhibitors)	1	1.4%	1.1%	Above
17 ModernaCovid-19Vaccine (Vaccines)	2	1.4%	0.4%	Above
18 Diazepam (Benzodiazepines)	1	1.3%	0.7%	Above
19 Lorazepam (Benzodiazepines)	1	1.3%	0.1%	Above
20 MetforminHydrochloride (Biguanides)	1	1.3%	0.0%	Below
21 Oxycodone/acetaminophen (Opiate Agonists)	1	1.3%	0.3%	Above
22 Omeprazole (Proton-Pump Inhibitors)	1	1.3%	0.0%	Below
23 AlbuterolSulfateHfa (Selective Beta-2-Adrenergic Agonists)	1	1.3%	0.2%	Even
24 SertralineHcl (Selective Serotonin-Reuptake Inhibitors)	1	1.3%	0.0%	Below
25 ArmourThyroid (Thyroid Agents)	3	1.2%	0.1%	Above

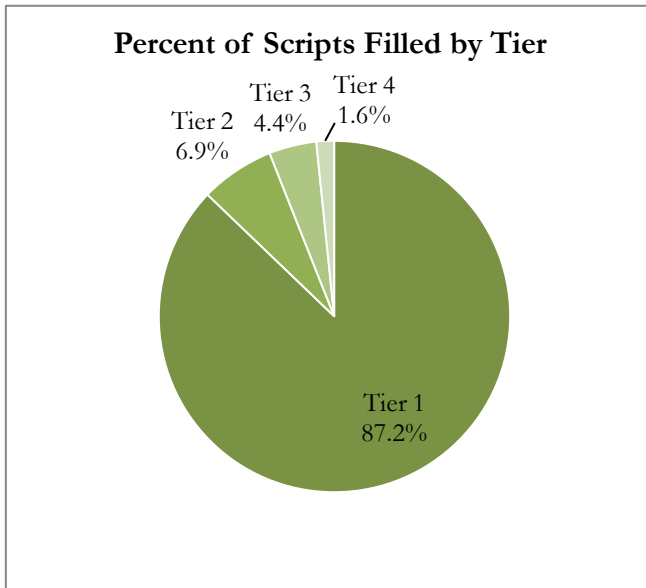
Note: Many of the top 25 drugs will typically have a relationship that is above the benchmark since they are the highest utilized drugs for George Washington Academy.

Note: This report does not include any data from the NationCare product (if applicable).

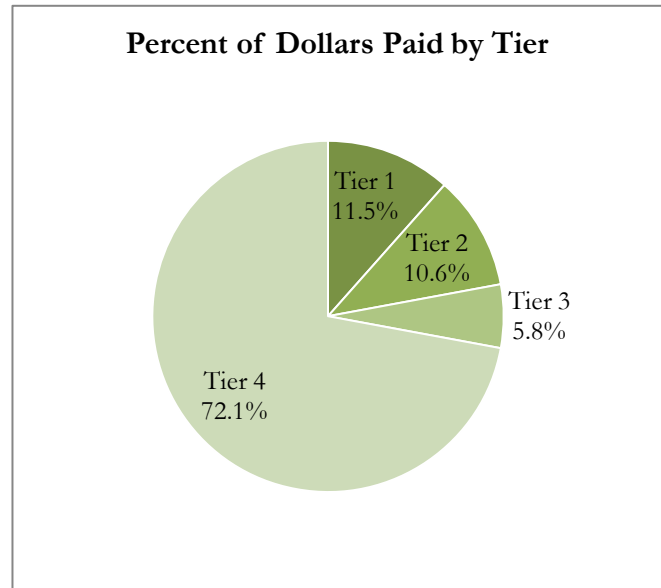
Pharmacy Utilization Summary

George Washington Academy

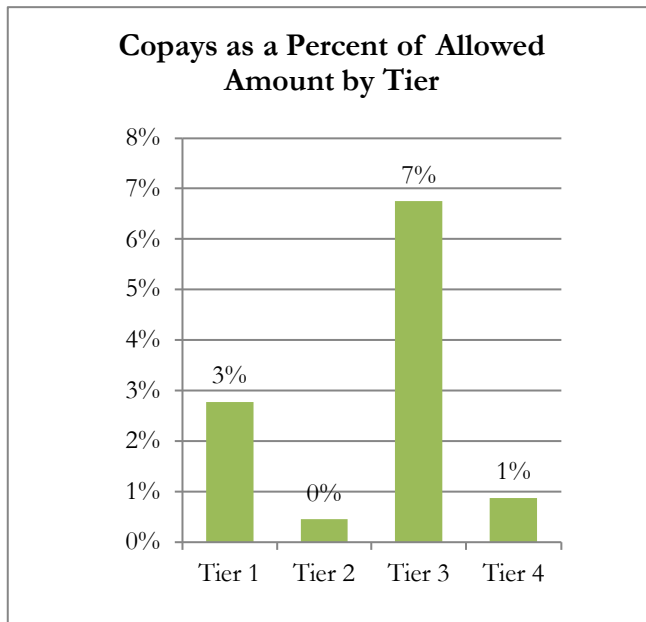
June, 2021 to May, 2022



Benchmark: Tier 1-86%, Tier 2-12%, Tier 3-2%, Tier 4-1%



Benchmark: Tier 1-15%, Tier 2-28%, Tier 3-5%, Tier 4-52%



Benchmark: Tier 1-16%, Tier 2-4%, Tier 3-8%, Tier 4-1%

Pharmacy Graph Notes

1) Percent of Scripts filled by Tier:
This graph illustrates the percentage of prescriptions that the members are filling. Benchmarks are provided as targets for pharmacy utilization.

2) Percent of Dollars Paid by Tier:
This graph illustrates where the paid dollars are located by tier. Benchmarks are provided to illustrate the average costs by tier.

3) Copays as a Percent of Allowed Amount by Tier:
This graph gives an indication of what percent of the total pharmacy cost the member is paying. The Benchmark illustrates the levels that the average employer is passing on to the member.

Note: This report does not include any data from the NationCare product (if applicable).

Get Everything Aligned

Ache in your back? Pain in your neck?

No worries, your plan is packaged with SelectHealth chiropractic coverage. Check out the “Chiropractic” line on your Member Payment Summary for your specific plan benefits, including any annual visit limits.

No matter where you live, work, or travel in the U.S. you will have coverage through our local networks in Utah, Idaho, and Nevada, and through the UnitedHealthcare Options PPO network in the other 47 states. The chart below will help you understand which network to use in each state.

The first step is to visit selecthealth.org/findadoctor where you can search for in-network chiropractors near you. Make sure you choose the right network from the network drop down. Once you have selected the right network, use the “Show Advanced Search Options” function and filter your results using the “Specialty” drop down and by checking “Chiropractor”

STATE	NETWORK (choose from the drop down)
Utah	Search using your Utah medical network
Idaho	SelectHealth BrightPath
Nevada	SelectHealth Med in Clark and Nye Counties; Beech Street (including Multiplan/PHCS) in all other counties
All Other States	UnitedHealthcare Options PPO

If you ever need help finding an in-network chiropractor, please call **800-515-2220** to reach our Member Advocates team who can help you.



QUESTIONS?

Questions about your chiropractic benefits?
Contact our Member Services team at 800-538-5038.

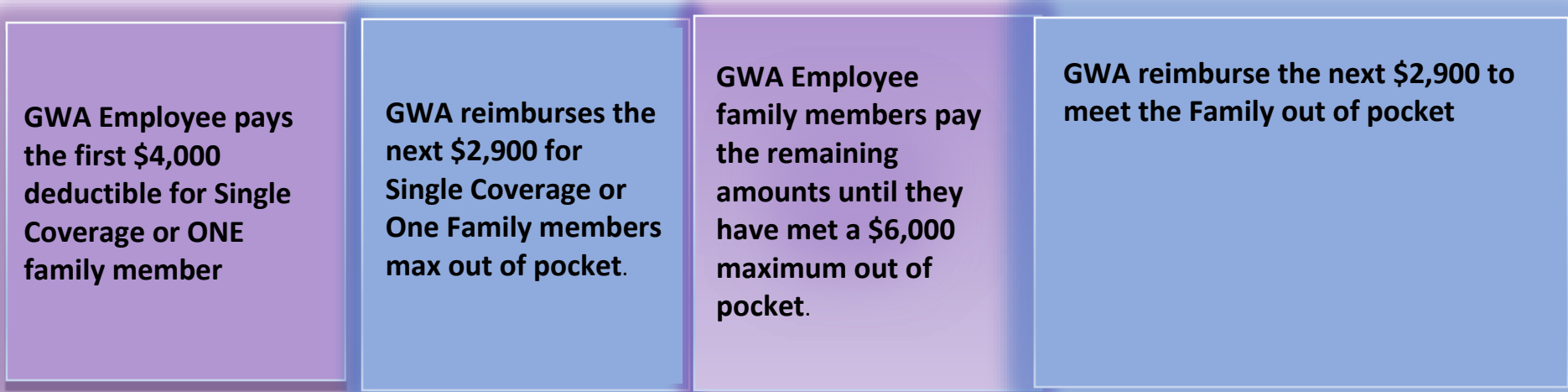
GWA's 2023 Plan Design

\$4,000 deductible for Single coverage or One family member

\$6,900 Max OOP for Single Coverage or One Family member

GWA Employee Pays a \$8,000 Family Out of Maximum

\$13,800 Maximum out of pocket for the entire family



In January, GWA will deposit **\$2,000** in each employee's H.S.A account to help pay the employee's deductible. With both GWA H.S.A contribution of **\$2,000** and the HRA Reimbursement of **\$2,900** for 1 family member or single coverage and another **\$2,900** for Family Coverage. The employee's family maximum of out of pocket will be **\$6,000**.

 GWA Employee

 GWA Reimburses the Employee

\$2,000/ single Coverage or 1 Family Member. \$6,000/ Family



emihealth.com

5101 SOUTH COMMERCE DRIVE
MURRAY, UTAH 84107
TOLL FREE 800 662 5850
CORPORATE 801 262 7476
FAX 801 269 9734
TTY 888 236 4823

September 22, 2022

George Washington Academy (Plan #2972)
Attn: Debra Kauvaka
2277 South 3000 East
St George, UT 84790

RE: Dental Renewal

Dear EMI Health Customer:

Thank you for choosing EMI Health as your Dental carrier. As the anniversary date for George Washington Academy approaches, we have completed our annual review and would like to propose renewal rates for the upcoming year.

Your Dental renewal rates, effective January 1, 2023 are listed below:

<u>Choice PPO</u>	<u>Current Rates</u>	<u>Renewal Rates</u>	<u>Change:</u> 5.5%
Employee:	\$50.40	\$53.20	
Employee + 1:	\$159.20	\$168.00	
Family:	\$159.20	\$168.00	

If you have questions regarding your benefits or would like to discuss other benefit options please contact your broker/consultant or your EMI Health account manager, Sami Morrison. We appreciate your business with EMI Health and look forward to providing your organization with affordable coverage for the upcoming year.

Please sign below to acknowledge your acceptance of the terms, conditions and obligations of the renewal rates including any benefit or language changes (if applicable) for the 2023 plan year. Please return this signed signature page to EMI Health by November 30, 2022. If this signature page is not received by the previously mentioned date your first payment under the new rates will be deemed an acceptance of the new rates, benefits, and agreements.

Signature

Date

Sincerely,

Underwriting Department
EMI Health



CLOSE



Hello

I have great news for George Washington Academy. The EyeMed renewal process just became easier. For renewals with no changes, we no longer require a signature. Your benefits will continue as-is.

Rates below will be effective 1/1/2021.

Tier	Current Rate	Renewal Rate
Employee Only	\$6.88	\$6.88
Employee + Spouse	\$13.02	\$13.02
Employee + Children	\$13.72	\$13.72
Employee + Family	\$20.15	\$20.15

As a reminder, we will continue to guarantee these rates for 48 months with the exception of changes in benefits, network, contributions, number of eligible employees or any future tax, fee or assessment imposed by the Federal or State governments. This document should be retained for your records.

We look forward to continuing our relationship. In addition to your same great savings we have a couple more to share.

- Routine Retinal Screening: Pay no more than \$39 at EyeMed in-network provider locations.
- Hearing Care Discount: 40% off of a hearing exam and set discounted pricing for hearing material from the Amplifon Hearing Health Care network.
- Sun Savings: \$20 off any purchase, or \$50 off purchase of \$200+ at Sunglass Hut.*
- International Travel Solution: Assistance for vision emergencies when traveling abroad.

If you'd like to see additional plan design options or if there are any questions, don't hesitate to contact me. We know things change, so if there is a new contact person, please send me their contact information so that I can follow up.

There is no additional action required.

Thank you for your business.

Best regards,

Mike Menzies
 Account Manager
 eyemedvisionwest@eyemed.com
 4000 Luxottica Place
 Mason, OH 45040

* May not be combined with any other offers or discounts. This is not insurance. Redeemable at any participating U.S. Sunglass Hut, Sunglass Hut Macy's or online, or at SunglassHut.com. Excludes Chanel, Maui Jim, Oakley, Tiffany and Tom Ford. Exclusions may apply. Limitations and exclusions may apply. For a complete list of current offers, EyeMed members may log into their member account at eyemed.com.

