

These Minutes are Pending Board Approval

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, February 22, 2024

7:30 p.m.

Board Meeting Minutes

Location: George Washington Academy
Library
2277 S 3000 E,
St. George, UT 84790

The Board Training was held at 7:00 p.m. prior to the Board Meeting.

The Board meeting convened at 7:30 p.m.

Board Welcome: Shannon Greer, President

Roll Call: Shannon Greer, President

Prayer: Joshua Serrano

Pledge of Allegiance: Amanda Mortenson

Board Members Present: Amanda Mortenson, Holly Myers, Kevin Peterson, Casey Unrein, Shauna Mahoney, Brady Pearce, Laura Pressley, Shannon Greer, and Blake Clark.

Others Present: Christine Giles, Spencer Adams, Deborah Odenwalder, Debbie Kauvaka, Chance Manzanaras, Jocelyn Larkin, Joshua Serrano, Jenna Ayers, and Jaxynn Smith.

Approval of Minutes: Kevin motions to approve the January 25, 2024 Board Meeting Minutes as outlined in the board packet. Amanda seconded. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, Shauna Mahoney, Brady Pearce, Laura Pressley, and Kevin Peterson.

Public Opportunity to Address the Board: None.

Set time for adjournment: Blake set time for adjournment at 8:30 p.m.

New Board Member Oath of Office Laura Snelson took the Oath of Office and became a member of the GWA Board.

Teacher Reports: Jaxynn Smith reports from 1st grade: It's really exciting to see how our first graders are improving their fluency skills! Taking what they've learned from our LETRS training and applying it in our classrooms while integrating it with the state standards and the CKLA curriculum has made a big difference in their progress/success. We're thrilled to see them growing and learning so much!

3rd Grade: We just finished our LETRS course last week and had a great day learning all about how we can implement better/more effective writing practices for next year! We're so proud of our hard work and are so excited to implement the strategies more fully! We had the Division of Wildlife Resources come and teach the students about native and nonnative species. We've also been preparing for the first 3rd Grade Math Competition.

5th Grade: I recently had my 5th student complete my 25 book reading challenge! It's something that I do in my class to encourage kids to read, and develop a love for reading. I have 3 more students that are also getting close, and I'm thrilled!

Jocelyn Larkin reports from the 4th Grade: 4th grade recently had an in-house field trip with the Utah Dept. of Natural Resources. A biologist presented on the wildlife along the virgin river, which tied in great to our Structures and Functions unit in science. We have more hands-on learning opportunities coming up next month as well. We've scheduled a guest to bring in snakes, Loveland Living Planet Aquarium, and each class will take a field trip to Zion National Park (through a grant-program Zion offers for 4th grade).

6th Grade: In 6th grade ELA we are learning about Howard Gardner's theory of intelligence. Students are researching and discovering what their intelligence is and will utilize skills and strategies into their learning at GWA in order to become more successful. They can navigate expectations while they comprehend information. They can discover how enjoyable the learning process is as they honor the intelligences inside of them!

Intelligences include: Linguistic, mathematical/logical, spatial, bodily/kinesthetic, musical, naturalistic, interpersonal, and intrapersonal intelligences.

7th Grade: Students in 7th grade science are completing their unit on Mendelian Genetics and have enjoyed learning about different traits being passed down to offspring.

We are ending the year with one of our big 6th grade moments: "Immigration Day!" Students dress up and are each assigned a role for the day. They have to simulate what it might have been like to immigrate to America in the early 1900's through Ellis Island. Regina Kerr spearheads this exciting event through her Social Studies focus. The event takes a lot of student leader and parent volunteer help to pull off but is always a lot of fun and educational / perspective widening for our students.

Our grade level had Renaissance Day last week, and it was awesome! The kids got to pretend to paint the ceiling of the sistine chapel, make sculptures out of "marble", make inventions, paint the modern Mona Lisa, and try acting in a Shakespeare play.

Shauna also reported that the 4th graders also had their Utah assembly and Jaxynn reported that Lance Allred the basketball player came to visit with the kids. Chance asked what the progress was for the LETRS training and Jaxyann and Jocelyn report that all 8 sections have been completed. They also report that they learned so much and are able to keep all the resources.

Administration Report: Before Blake gave his report, Shannon gave a shout out to Blake and his admin team for all the hard work they have been doing to build relationship with the community. Blake reports that the schools relationship with Utah Tech has never been better in so much that he now teaches a class on Charter Schools and seeing a lot more success in hiring fairs. Blake reports that the biggest number change has been with Absences and Tardiness due to illnesses. Student Count is 1006 currently. Debbie is working hard with the lottery for next year which wrapped up the 1st of February, so we have the projected enrollment for next year. Christine and Blake worked with the 1st grade teachers to rework their teaching curriculum and are seeing an 8% increase on average for the grade so we're hopeful of these changes. All reports that have been completed. Casey states that the projected enrollment numbers look great and asks if there was space for more students. Blake reports that there is more space. Blake reminds the board of his previously reported idea for creating a 6th kindergarten class but it was decided against due to it requiring the art program to be moved to a transportable cart which art is a staple of GWA's curriculum. Casey asked if the projected numbers included students that may not return. Blake states that we're projecting a 97% retention rate for next year. In 1st, 2nd, 3rd, & 4th we only have 3 openings currently for next year. 5th and 6th have more openings due to the school district transition between school buildings.

Financial Report: Spencer reports that we are looking at the budget as of January 31st so just over halfway through the fiscal year. He reports that everything is looking great! The finance committee minutes outline some of the adjustments that were made to the specific budget line items. Some of the biggest changes in the budget continue to be the interest. The interest rate is continuing to be great and are taking advantage of that. We did increase some of the expense line to reflect the current year actuals and for what we have planned for the rest of the year to make sure we are setting ourselves up to have a good bottom line when the fiscal year ends. Spencer drew attention to some of the changes that the Board will see on the Summary Page. There was a steep decline in the CASH section for the month of January and it's due to the recent land purchase. Spencer explained where this purchase was placed in the budget and why. Spencer indicates that the Board will want to ensure that this purchase is included otherwise we'll have more expenses than the Board has approved. Overall our ratios are looking good. Our unrestricted income is well above our goal. We're looking to end the year in a very healthy spot and are overall in great shape. We'll continue to monitor as we wind down the year. Kevin asked if we could add the land to the Balance Sheet. Spencer reports that he contacted the auditor on that and that he is just waiting for the Property Loss to finish and then the auditors will add that entry. Casey asked if the steep drop off in the expenses was the beginning of the year's start up expenses. Blake reports that the stipend is high in December. No reports in February.

Committee Reports:

- **Policies Committee** – Nothing to report.
- **Finance Committee** – Nothing to report.
- **Audit Committee** – 2 bids are in and are working on getting a 3rd quote in March with the goal of picking 1 for approval by April. Shannon asked to have this approval added to the March Board Meeting Action Items..
- **Benefits Committee** – Amanda reported on the status of the Online Therapeutic Program bids and selection. 2 of the companies have given demonstrations of their program. And will meet on Monday to finalize this proposal. Shannon asked Amanda to give some

background on what this program is. Amanda explained what the program and purpose is with some of the tools available. Shannon also explained that this would be an upgrade from what we currently have. Holly clarified how the bids were being presented with transparency to both bidding companies.

- **Curriculum Committee** – Cristine reports that they are continuing their very scrupulous review of the curriculum. They are looking at one more curriculum called IXL Reading this next month. Davis School District has adopted this and she spoke to someone in the Davis School district. They want to make sure that they consider all the potential curriculums available. The committee agrees that it's important to find the curriculums that will support the state standards as they feel that other current or previous curriculums were not and thus resulted in the data not being where it could be.
- **Outreach Committee** – Nothing to report.
- **Technology Committee** – Nothing to report.
- **LAND Trust Committee** – Nothing to report.
- **PTO Committee** – Amanda reported that raised over \$8,000 for the Cox benefit. Just did a teacher appreciation lunch on Valentine's Day with the funds that earned by one of the restaurant nights and had donations from parents. Still looking for PTO member replacements. Looking for a hired person to take over some of the workload over from the volunteer PTO members including the Sponsorships. Shannon gave some background information on the potential position. Shannon requests that the Board consider the situation and share their thoughts to Amanda via email. All of the PTO are leaving so it will be a new board due to personal life changes for the previous members. Blake expressed that the current PTO has been "gold" to work through.
- **Board Development Committee** – Next month will be on Board Evaluations. Shannon will meet with Laura Snelson for her new Board member on-boarding. .
- **Campus Management Committee** – Nothing to report.

Discussion and/or Action Items:

- **Expenditures over \$5,000**
- **SPIRE program proposal** - Kevin made a motion to accept the S.P.I.R.E program proposal in the amount of \$11,229.45. Shauna seconded. Kevin asked why there isn't a level 5. Christine reported that when the SPED population was tested, it was determined that we wouldn't need it. Christine expressed that she's excited for this program as it'll provide the teachers with the tools needed to help the SPED population. Shannon asked Christine to share the result data from this program change. Casey noted that the budget has a little over \$30,000 for SpEd curriculum and asked if this would be coming out of that line or if this was something above that amount. Christine confirmed that it would be coming out of that line in the budget. Kevin asked if we could not pay the tax as we should be tax exempt. Shannon states that if we do have to pay it then we can resubmit to the state to get that back. Kevin amended his motion to approve to not exceed to allow for the potential change that taking the taxes off would cause. Shauna seconded. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, Shauna Mahoney, Brady Pearce, Laura Pressley, Laura Snelson, and Kevin Peterson.
- **Update Door System and Alarm System** - Amanda made a motion to approve the updated door and alarm system as outlined in the board packet for \$6,600.00. Kevin seconded. Brady asked if the service fee needed to be included in the motion. Shannon

clarified that the ongoing fee would not be something that we would need to approve. Casey asked if Steve will look into if there is any savings possible if we pay the fee in a yearly payment. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, Shauna Mahoney, Brady Pearce, Laura Pressley, Laura Snelson, and Kevin Peterson.

- **Land Trust Upcoming School Plan 2024-25** - Kevin made a motion to accept the Land Trust plan as outlined in the board packet. Holly seconded. Holly asked if this plan was close to last year's plan. Kevin confirmed and explained why with reasoning behind each goal including the after school programs. Brady asked how many take advantage of the after school programs. Blake gave the current numbers for each program. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, Shauna Mahoney, Brady Pearce, Laura Pressley, and Kevin Peterson.

Closed Meeting – *none*.

Reconvene — Take all appropriate action in relation to closed session items.

Next Meeting: The next regular Board Meeting will be held on March 28th, 2024 at 7:30 pm.

Shannon asked if 2-3 Board members would volunteer to put together for the faculty years of service and retirement gifts. Kevin, Laura Snelson, Amanda, and Shauna volunteered. The date of the last faculty meeting of the school year is on May 17th. Shannon will get the numbers of each award needed to the volunteers for this.

Holly's last month will be next month.

Adjournment: Shannon motioned to adjourn. The board adjourned at 8:30 p.m.

Written by Deborah Odenwalder, Board Clerk



Financial Summary

as of February 29, 2024

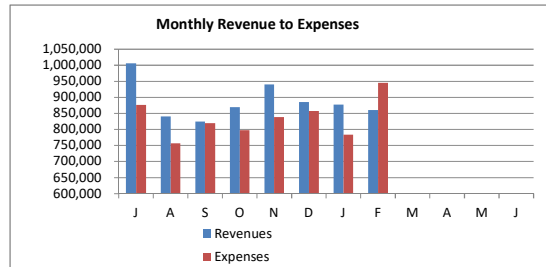
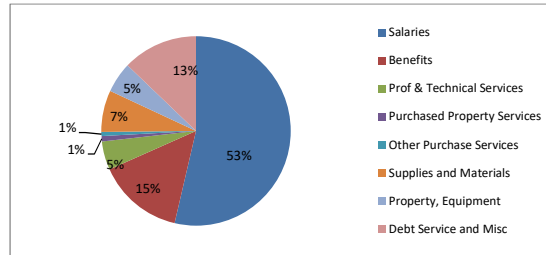
66.7% through the Year

BUDGET REPORT

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	1000	1000	1000	
Revenue				
1000 Local	\$ 474,979	\$ 412,758	\$ 643,343	74%
3000 State	\$ 6,593,117	\$ 9,559,025	\$ 9,814,009	67%
4000 Federal	\$ 127,554	\$ 426,905	\$ 431,108	30%
Total Revenue	\$ 7,195,650	\$ 10,398,688	\$ 10,888,460	66%
Expenses				
100 Salaries	\$ 3,637,425	\$ 5,555,364	\$ 5,567,932	65%
200 Benefits	\$ 941,843	\$ 1,512,700	\$ 1,524,700	62%
300 Prof & Technical Services	\$ 309,923	\$ 448,910	\$ 503,993	61%
400 Purchased Property Services	\$ 57,709	\$ 91,280	\$ 91,280	63%
500 Other Purchase Services	\$ 36,016	\$ 71,924	\$ 71,924	50%
600 Supplies and Materials	\$ 540,659	\$ 696,952	\$ 738,918	73%
700 Property, Equipment	\$ 424,110	\$ 433,081	\$ 541,999	78%
800 Debt Service and Misc	\$ 899,469	\$ 1,333,313	\$ 1,333,313	67%
Total Expenses	\$ 6,847,154	\$ 10,143,524	\$ 10,374,059	66%
Net Income from Operations	\$ 348,496	\$ 255,164	\$ 514,401	68%
Operating Margin	4.8%	2.5%	4.7%	

EXPENSES

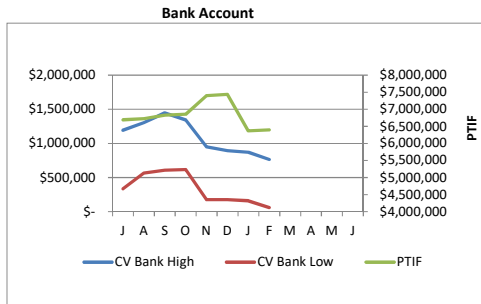


RATIOS

	Actual	Goal	Covenant	Prior Mth Change
Operating Margin	4.7%	5%		0.02%
Debt Service Coverage	1.40	1.25	1.05	0.00
Days Cash on Hand	252	130	30	(3)
Building Payment %	12.4%	< 22%		0.0%
Unrestricted NI	\$ 479,743	\$250,000		\$ 500

CASH

Month Ending Cash Balance	\$ 7,160,112	Includes \$6,395,046 PTIF
Days Cash on Hand	252	

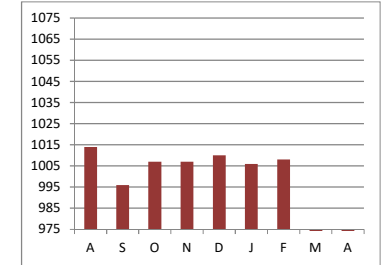


RESERVES

	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 6,373,107	\$ 6,373,107
Reserves Added this Year	\$ 348,496	\$ 479,743
Land Purchase	\$ (1,186,138)	\$ (1,186,138)
New Reserve Balance	\$ 5,535,465	\$ 5,666,712

ENROLLMENT

	A	S	O	N	D	J	F	M	A
K	134	135	138	138	137	137	136		
1	136	133	135	136	135	133	134		
2	135	131	131	131	134	133	135		
3	137	135	137	137	138	139	138		
4	135	130	131	132	131	131	132		
5	125	121	119	119	119	119	120		
6	115	115	120	120	120	120			
7	97	96	96	94	96	94	93		
Total	1014	996	1007	1007	1010	1006	1008	0	0
	WPU		921.33						



Budget Detail Report

Actuals as of: **February 29, 2024**

Percentage of Year: **66.7%**



	(1005 Students)		(1000 Students)		1000		% Change From Prior Mth	
	FY23 Actuals	Current Yr Actuals	Approved Budget	Changes	Forecast	% of Forecast		
Revenue								
1000 Revenue From Local Sources								
1510 Interest	\$ 254,766	\$ 303,779	\$ 163,000	\$ 225,000	\$ 388,000	78.3%	14.8%	
1600 Food Services	\$ 223,939	\$ 150,393	\$ 230,000	\$ -	\$ 230,000	65.4%	21.1%	
1741 Student Activities and Fees	\$ 1,953	\$ 194	\$ 2,000	\$ (1,700)	\$ 300	64.7%	25.2%	
1741 Textbook and Library Fees	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
1920 Donations	\$ 14,767	\$ 10,985	\$ 4,000	\$ 6,985	\$ 10,985	100.0%	0.0%	
1920 GWA Gives Back	\$ 1,289	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
1920 Staff Lounge	\$ 2,359	\$ 1,007	\$ 3,000	\$ -	\$ 3,000	33.6%	0.0%	
1920 Dixie Direct Fundraiser	\$ 8,480	\$ 7,175	\$ 8,558	\$ -	\$ 8,558	83.8%	0.0%	
1930 Sales of Assets	\$ 14,895	\$ 50	\$ 1,000	\$ -	\$ 1,000	5.0%	0.0%	
1990 Background Checks	\$ 1,230	\$ 1,396	\$ 1,200	\$ 300	\$ 1,500	93.1%	10.5%	
1990 Miscellaneous Income	\$ 6,274	\$ -	\$ -	\$ -	\$ -	0.0%	-100.0%	
Total 1000:	\$ 529,952	\$ 474,979	\$ 412,758	\$ 230,585	\$ 643,343	73.8%	15.9%	
3000 Revenue From State Sources MSP								
30-3005 Regular School Program K	\$ 291,444	\$ 319,830	\$ 480,215	\$ (626)	\$ 479,589	66.7%	14.3%	
30-3010 Regular School Program 1-12	\$ 3,164,957	\$ 2,217,814	\$ 3,327,805	\$ (1,446)	\$ 3,326,359	66.7%	14.3%	
30-3020 Professional Staff	\$ 219,093	\$ 163,431	\$ 259,100	\$ (19,815)	\$ 239,285	68.3%	13.1%	
31-1205 Sped Educ Reg Add-On W/PUS	\$ 451,736	\$ 358,813	\$ 451,736	\$ 86,483	\$ 538,219	66.7%	14.3%	
31-1210 Sped Educ Reg Self Contained	\$ 40,335	\$ 22,589	\$ 40,335	\$ (6,452)	\$ 33,883	66.7%	14.3%	
31-1220 Sped Educ Extended Year Program	\$ 3,721	\$ 2,617	\$ 3,721	\$ 204	\$ 3,925	66.7%	14.3%	
31-1225 Sped Educ State Programs	\$ 7,355	\$ 5,570	\$ 7,355	\$ 1,000	\$ 8,355	66.7%	14.3%	
31-1278 Sped Educ Stipends Extended Year	\$ 672	\$ 3,024	\$ 672	\$ 2,352	\$ 3,024	100.0%	0.0%	
31-5201 Class Size Reduction K-8	\$ 373,915	\$ 262,025	\$ 388,096	\$ 4,777	\$ 392,873	66.7%	14.3%	
31-5344 Enhancement for At-Risk Student	\$ 91,935	\$ 83,260	\$ 121,647	\$ 3,243	\$ 124,890	66.7%	14.3%	
31-5901 Career and Tech Ed Dist. Add-On	\$ 6,087	\$ 4,153	\$ 6,057	\$ (92)	\$ 5,965	69.6%	14.3%	
31-5903 CTE Comprehensive Counseling	\$ 20,000	\$ 13,333	\$ -	\$ 20,000	\$ 20,000	66.7%	14.3%	
32-0500 Charter School Admin. Costs Base Funding	\$ 94,613	\$ 76,398	\$ 115,000	\$ (460)	\$ 114,540	66.7%	14.3%	
32-5310 Flexible Allocation	\$ -	\$ 1,522	\$ -	\$ 2,279	\$ 2,279	66.8%	14.2%	
32-5619 Charter School Local Replacement	\$ 2,958,636	\$ 2,075,569	\$ 3,074,000	\$ 37,614	\$ 3,111,614	66.7%	14.3%	
32-5651 Educator Professional Time	\$ 86,875	\$ 89,531	\$ 86,875	\$ 2,656	\$ 89,531	100.0%	0.0%	
32-5653 Public Ed Capital & Technology	\$ 128,603	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
33-5641 Early Intervention - OEK	\$ 150,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
33-5805 Early Literacy	\$ 31,910	\$ 28,548	\$ 31,751	\$ 9,992	\$ 41,743	68.4%	14.3%	
34-5642 Elementary School Counselor Grant	\$ 50,000	\$ 50,000	\$ 50,000	\$ -	\$ 50,000	100.0%	0.0%	
34-5807 Teacher Salary Supplement Program	\$ 5,356	\$ 1,885	\$ -	\$ 1,885	\$ 1,885	100.0%	0.0%	
34-5868 Teacher Supplies and Materials	\$ 7,372	\$ 7,610	\$ 7,335	\$ 275	\$ 7,610	100.0%	0.0%	
34-5876 Educator Salary Adjustment	\$ 260,792	\$ 376,576	\$ 509,000	\$ 55,864	\$ 564,864	66.7%	14.3%	
34-5911 ELL Software	\$ 4,226	\$ -	\$ 2,787	\$ -	\$ 2,787	0.0%	0.0%	
35-5420 School Land Trust Program	\$ 137,330	\$ 145,119	\$ 144,463	\$ 656	\$ 145,119	100.0%	0.0%	
35-5655 Digital Teaching & Learning	\$ 60,837	\$ -	\$ 29,000	\$ 29,794	\$ 58,794	0.0%	0.0%	
35-5666 Professional Learning Grant	\$ 9,033	\$ 5,993	\$ 8,907	\$ -	\$ 8,907	67.3%	14.3%	
35-5678 TSSA	\$ 197,799	\$ 154,033	\$ 231,049	\$ -	\$ 231,049	66.7%	14.3%	
35-5679 School Based Mental Health Grant	\$ 55,474	\$ -	\$ 55,749	\$ -	\$ 55,749	0.0%	0.0%	
35-5810 Library Books & Elective Resources	\$ 1,067	\$ -	\$ 1,062	\$ (1,062)	\$ -	0.0%	0.0%	
35-5882 Beverly Taylor Sorenson Grant	\$ 28,616	\$ 31,693	\$ 30,333	\$ 17,207	\$ 47,540	66.7%	14.3%	
Library ARPA Physical Collection Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
Children & Teen Enhancement Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
38-5654 Period Products in Schools	\$ 2,244	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
38-5673 Substance Prevention	\$ 4,000	\$ 4,000	\$ 3,980	\$ 20	\$ 4,000	100.0%	0.0%	
38-5674 Elementary Suicide Prevention	\$ 1,000	\$ 1,000	\$ 995	\$ 5	\$ 1,000	100.0%	0.0%	
38-5697 LETRS Professional Development Grant	\$ 48,637	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
38-5914 School Safety Grant	\$ -	\$ -	\$ -	\$ -	\$ 8,631	0.0%	0.0%	
38-8070 School Lunch (Liquor Tax)	\$ 88,363	\$ 87,181	\$ 90,000	\$ -	\$ 90,000	96.9%	22.8%	
Total 3000:	\$ 9,084,033	\$ 6,593,117	\$ 9,559,025	\$ 246,353	\$ 9,814,009	67.2%	13.6%	
4000 Revenue From Federal Sources								
42-7210 ESSER CARES	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
42-7215 ESSER II CARES	\$ 51,797	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
42-7220 GEERS	\$ 27,544	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
42-7225 ESSER III ARP	\$ 63,065	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
45-7280 Corona Relief Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
45-7522 IDEA Pre-School	\$ 2,328	\$ -	\$ 2,328	\$ 175	\$ 2,503	0.0%	0.0%	
45-7524 IDEA Flow-Through	\$ 138,864	\$ -	\$ 139,374	\$ 13,873	\$ 153,247	0.0%	0.0%	
45-8075 National School Lunch Program	\$ 94,514	\$ 32,453	\$ 80,000	\$ (22,520)	\$ 57,480	56.5%	24.9%	
45-8075 Free & Reduced Reimbursement	\$ 111,907	\$ 76,972	\$ 115,000	\$ 17,555	\$ 132,555	58.1%	23.3%	
45-8075 School Breakfast Program	\$ 34,053	\$ 17,476	\$ 35,000	\$ (5,533)	\$ 29,467	59.3%	22.6%	
45-8080 Pandemic EBT	\$ -	\$ 653	\$ -	\$ 653	\$ 653	100.0%	0.0%	
47-7290 CARES UEN WIFI	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
48-7801 Federal Title I A	\$ 42,905	\$ -	\$ 47,055	\$ -	\$ 47,055	0.0%	0.0%	
48-7860 Federal NCLB Title II A	\$ 8,148	\$ -	\$ 8,148	\$ -	\$ 8,148	0.0%	0.0%	
Total 4000:	\$ 575,125	\$ 127,554	\$ 426,905	\$ 4,203	\$ 431,108	29.6%	23.5%	
Total Revenue:	\$ 10,189,110	\$ 7,195,650	\$ 10,398,688	\$ 481,141	\$ 10,888,460	0.0%	13.9%	



(1005 Students)

Current Yr

(1000 Students)

1000

% Change From
Prior Mth

Expenses

	FY23 Actuals	Current Yr Actuals	Approved Budget	Changes	Forecast	% of Forecast	% Change From Prior Mth
100 Salaries							
121 Administration	\$ 398,820	\$ 343,712	\$ 504,916	\$ -	\$ 504,916	68.1%	14.4%
131 Teachers	\$ 2,761,514	\$ 1,937,408	\$ 2,962,835	\$ -	\$ 2,962,835	65.4%	14.9%
131 Special Education Salaries	\$ 228,902	\$ 226,040	\$ 300,208	\$ -	\$ 300,208	75.3%	15.6%
132 Substitute Teachers (PTO Stipend)	\$ 17,677	\$ -	\$ 30,000	\$ -	\$ 30,000	0.0%	0.0%
132 SpEd Substitutes	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%	0.0%
131 Stipends / Merit Pay	\$ 118,561	\$ 86,607	\$ 88,020	\$ 22,500	\$ 110,520	78.4%	4.9%
131 Summer Professional Development	\$ 12,000	\$ -	\$ 60,000	\$ (55,000)	\$ 5,000	0.0%	0.0%
131 LETRS Training Stipend	\$ 72,500	\$ 50,000	\$ 72,500	\$ (22,500)	\$ 50,000	100.0%	100.0%
131 LAND TRUST - Stipends	\$ 750	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
131 Special Education Stipends (After School)	\$ 4,100	\$ 1,550	\$ -	\$ 1,568	\$ 1,568	98.9%	0.0%
131 ESSER II - Stipends	\$ 11,125	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
131 ESSER III - After School Stipends	\$ 55,904	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
142 Counselor	\$ 176,182	\$ 152,141	\$ 235,501	\$ -	\$ 235,501	64.6%	14.8%
143 School Nurse	\$ 4,053	\$ 4,141	\$ 9,584	\$ -	\$ 9,584	43.2%	32.7%
145 Librarian / Literacy Aide	\$ 15,410	\$ 14,741	\$ 20,796	\$ -	\$ 20,796	70.9%	24.3%
152 Secretaries	\$ 123,082	\$ 91,168	\$ 133,065	\$ -	\$ 133,065	68.5%	18.4%
161 Teacher Aides, Reading Specialists & Subs	\$ 400,441	\$ 322,515	\$ 440,616	\$ 66,000	\$ 506,616	63.7%	24.5%
161 LAND TRUST - K Aide/Student Support Para	\$ 37,037	\$ 13,362	\$ 34,000	\$ -	\$ 34,000	39.3%	23.6%
161 SpEd Aides & Speech Therapist	\$ 144,231	\$ 95,085	\$ 171,383	\$ -	\$ 171,383	55.5%	24.6%
162 Computer Aides	\$ 20,417	\$ 15,337	\$ 22,947	\$ -	\$ 22,947	66.8%	21.3%
182 Custodial & Maintenance	\$ 87,723	\$ 76,464	\$ 111,764	\$ -	\$ 111,764	68.4%	17.8%
191 Lunch Room Aide	\$ 237,130	\$ 207,154	\$ 352,229	\$ -	\$ 352,229	58.8%	17.3%
Total 100:	\$ 4,927,559	\$ 3,637,425	\$ 5,555,364	\$ 12,568	\$ 5,567,932	65.3%	16.7%
200 Employee Benefits							
220 Social Security	\$ 332,071	\$ 240,744	\$ 405,174	\$ -	\$ 405,174	59.4%	16.4%
220 LAND TRUST - BENEFITS	\$ 2,891	\$ 2,894	\$ 2,601	\$ -	\$ 2,601	111.3%	18.9%
220 SpEd Social Security	\$ 22,541	\$ 21,994	\$ 36,459	\$ -	\$ 36,459	60.3%	19.7%
230 Retirement	\$ 213,702	\$ 167,768	\$ 313,975	\$ -	\$ 313,975	53.4%	18.7%
240 Group Insurance	\$ 652,212	\$ 453,837	\$ 697,840	\$ -	\$ 697,840	65.0%	11.2%
240 Mental Health	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
240 Deductible Stipend	\$ 30,430	\$ 31,602	\$ 23,000	\$ 12,000	\$ 35,000	90.3%	0.0%
270 Worker's Compensation Fund	\$ 18,867	\$ 18,224	\$ 20,412	\$ -	\$ 20,412	89.3%	0.0%
280 Unemployment Insurance	\$ 11,384	\$ 4,780	\$ 13,238	\$ -	\$ 13,238	36.1%	0.0%
Total 200:	\$ 1,284,098	\$ 941,843	\$ 1,512,700	\$ 12,000	\$ 1,524,700	61.8%	13.2%
300 Purchased Professional & Technical							
320 Special Education Contractors	\$ 120,248	\$ 84,871	\$ 135,000	\$ -	\$ 135,000	62.9%	18.2%
320 Counseling Services - (FY20 LCSW-Mental Health)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
320 Math Center Contract	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
330 Employee Training & Development	\$ 4,768	\$ 9,376	\$ 9,000	\$ 55,000	\$ 64,000	14.7%	0.0%
330 TSSA - Training & Development	\$ 27,200	\$ 30,000	\$ 30,000	\$ -	\$ 30,000	100.0%	0.0%
330 LAND TRUST - Training & Development	\$ 2,050	\$ 21,932	\$ 24,000	\$ -	\$ 24,000	91.4%	0.0%
330 SpEd Training & Development	\$ 6,000	\$ 2,970	\$ 6,000	\$ -	\$ 6,000	49.5%	800.0%
330 LETRS Professional Learning Grant PD	\$ 46,401	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
330 SEDC Services	\$ 2,583	\$ 3,861	\$ 3,891	\$ -	\$ 3,891	99.2%	0.0%
340 Audit	\$ 22,134	\$ 14,112	\$ 14,134	\$ -	\$ 14,134	99.8%	41.1%
345 Business Manager Services	\$ 78,336	\$ 53,272	\$ 79,908	\$ -	\$ 79,908	66.7%	14.3%
349 Legal Services	\$ 4,568	\$ 140	\$ 8,000	\$ -	\$ 8,000	1.8%	0.0%
350 Technical Services (IT)	\$ 96,419	\$ 66,191	\$ 102,000	\$ -	\$ 102,000	64.9%	14.3%
580 Admin & Teacher Travel (Meals)	\$ 9,965	\$ 5,952	\$ 7,000	\$ -	\$ 7,000	85.0%	260.1%
580 TSSA - Travel	\$ 20,431	\$ 10,102	\$ 20,280	\$ -	\$ 20,280	49.8%	-18.9%
580 LAND TRUST - Travel	\$ 13,068	\$ 3,364	\$ 6,000	\$ -	\$ 6,000	56.1%	0.0%
580 SpEd - Travel	\$ 5,625	\$ 3,780	\$ 3,697	\$ 83	\$ 3,780	100.0%	81.6%
Total 300:	\$ 459,796	\$ 309,923	\$ 448,910	\$ 55,083	\$ 503,993	61.5%	14.1%
400 Purchased Property Services							
411 Water/Sewage	\$ 9,628	\$ 6,557	\$ 12,000	\$ -	\$ 12,000	54.6%	0.4%
411 Water Rights	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
412 Disposal Services	\$ 14,246	\$ 11,349	\$ 15,480	\$ -	\$ 15,480	73.3%	14.8%
420 Cleaning Services	\$ 5,313	\$ 5,380	\$ 5,800	\$ -	\$ 5,800	92.8%	0.0%
431 Lawn Care Services	\$ 11,800	\$ 9,805	\$ 12,000	\$ -	\$ 12,000	81.7%	31.5%
431 Non-Technology Repairs & Maintenance	\$ 35,423	\$ 19,359	\$ 33,000	\$ -	\$ 33,000	58.7%	19.6%
432 Copy Machine Servicing	\$ 5,629	\$ 5,259	\$ 13,000	\$ -	\$ 13,000	40.5%	0.0%
Total 400:	\$ 82,039	\$ 57,709	\$ 91,280	\$ 55,166	\$ 91,280	63.2%	13.8%
500 Other Purchased Services							
522 Property & Liability Insurance	\$ 45,243	\$ 29,630	\$ 48,924	\$ -	\$ 48,924	60.6%	41.5%
530 Telephone	\$ 11,670	\$ 644	\$ 11,000	\$ -	\$ 11,000	5.9%	16.9%
540 Marketing	\$ 7,923	\$ 5,442	\$ 9,000	\$ -	\$ 9,000	60.5%	10.8%
590 Field Trips / Bus Rental	\$ 170	\$ 300	\$ 3,000	\$ -	\$ 3,000	10.0%	0.0%
Total 500:	\$ 65,006	\$ 36,016	\$ 71,924	\$ -	\$ 71,924	50.1%	34.8%



	(1005 Students) FY23 Actuals	Current Yr Actuals	(1000 Students) Approved Budget	1000 Changes	Forecast	% of Forecast	% Change From Prior Mth
600 Supplies and Materials							
610a Classroom Supplies	\$ 9,311	\$ 18,509	\$ 44,680	\$ -	\$ 44,680	41.4%	32.6%
610a TSSA - Supplies	\$ 12,039	\$ 17,159	\$ 18,320	\$ -	\$ 18,320	93.7%	0.1%
610a LAND TRUST	\$ 11,967	\$ 12,000	\$ 12,000	\$ -	\$ 12,000	100.0%	0.0%
610a ESSER II - Supplies	\$ 17,120	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
610b Special Ed Supplies	\$ 5,962	\$ 8,745	\$ 10,000	\$ -	\$ 10,000	87.5%	21.4%
610 Elective Supplies	\$ -	\$ -	\$ 6,000	\$ -	\$ 6,000	0.0%	0.0%
610c Theatre Supplies	\$ 6,886	\$ 1,636	\$ 7,000	\$ -	\$ 7,000	23.4%	58.5%
610d CCA Expenses	\$ 4,843	\$ 3,812	\$ 5,179	\$ -	\$ 5,179	73.6%	0.0%
610e Student Activity Supplies / Incentives	\$ 13,776	\$ 10,112	\$ 14,000	\$ -	\$ 14,000	72.2%	10.1%
610f Board Expenses/meals	\$ 3,811	\$ 2,790	\$ 7,000	\$ -	\$ 7,000	39.9%	0.0%
610g Office Supplies/General	\$ 28,242	\$ 28,389	\$ 28,000	\$ 15,000	\$ 43,000	66.0%	23.4%
610h Safety Supplies	\$ 3,666	\$ 1,473	\$ 4,000	\$ -	\$ 4,000	36.8%	0.0%
School Safety Grant	\$ -	\$ 3,015	\$ -	\$ 3,015	\$ 3,015	100.0%	15.5%
610i GWA Gives Back	\$ 1,295	\$ -	\$ 1,300	\$ -	\$ 1,300	0.0%	0.0%
610j First Aid Supplies	\$ 862	\$ 388	\$ 1,000	\$ -	\$ 1,000	38.8%	84.8%
610k Director Discretionary Fund	\$ 10,813	\$ 8,110	\$ 10,000	\$ -	\$ 10,000	81.1%	4.7%
610m Staff Lounge	\$ 5,797	\$ 4,058	\$ 6,000	\$ -	\$ 6,000	67.6%	25.2%
610n Swag Store	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
610o Christmas Party	\$ 3,780	\$ 4,975	\$ 4,018	\$ 957	\$ 4,975	100.0%	3.2%
610p Health and Wellness	\$ 2,285	\$ 1,685	\$ 3,000	\$ -	\$ 3,000	56.2%	0.0%
621 Natural Gas	\$ 13,925	\$ 6,631	\$ 14,000	\$ -	\$ 14,000	47.4%	90.7%
622 Electricity	\$ 43,158	\$ 30,125	\$ 43,000	\$ -	\$ 43,000	70.1%	9.8%
630 School Lunch Prgm	\$ 219,264	\$ 193,123	\$ 230,000	\$ -	\$ 230,000	84.0%	22.2%
641 Textbooks/Curriculum	\$ 31,430	\$ 51,190	\$ 56,800	\$ (6,800)	\$ 50,000	102.4%	16.0%
641 TSSA - Curriculum	\$ 40,098	\$ 39,200	\$ 39,200	\$ -	\$ 39,200	100.0%	0.0%
641 UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
641 Digital Teaching & Learning Curriculum	\$ 44,832	\$ 35,330	\$ 14,000	\$ 29,794	\$ 43,794	80.7%	0.0%
641 SpEd - Textbooks/Curriculum	\$ 30,019	\$ 922	\$ 29,855	\$ -	\$ 29,855	3.1%	0.0%
644 Library Books	\$ 5,318	\$ 3,861	\$ 4,000	\$ -	\$ 4,000	96.5%	9.5%
670 Educational Software	\$ 6,230	\$ 8,754	\$ 15,700	\$ -	\$ 15,700	55.8%	0.0%
670 TSSA - Educational Software	\$ 10,117	\$ 10,246	\$ 10,800	\$ -	\$ 10,800	94.9%	0.0%
670 LAND TRUST - Educational Software	\$ 15,389	\$ 9,551	\$ 14,700	\$ -	\$ 14,700	65.0%	0.0%
670 SpEd - Educational Software	\$ 690	\$ -	\$ 3,400	\$ -	\$ 3,400	0.0%	0.0%
680 Maintenance Supplies & Material	\$ 38,699	\$ 24,870	\$ 40,000	\$ -	\$ 40,000	62.2%	19.8%
Total 600:	\$ 641,624	\$ 540,659	\$ 696,952	\$ 41,966	\$ 738,918	73.2%	14.2%
700 Property							
710 Land and Site Improvements & Building	\$ 32,792	\$ 92,653	\$ 25,000	\$ 73,331	\$ 98,331	94.2%	1.4%
733 Furniture and Fixtures	\$ 21,332	\$ 18,386	\$ 20,000	\$ 13,000	\$ 33,000	55.7%	184.7%
733 SpEd - Furniture and Fixtures	\$ 1,296	\$ 1,533	\$ 1,296	\$ 237	\$ 1,533	100.0%	0.0%
734 Technology Hardware	\$ 1,271	\$ 2,829	\$ 2,700	\$ 13,000	\$ 15,700	18.0%	197.8%
734 LAND TRUST - Hardware	\$ 49,510	\$ 2,100	\$ 55,000	\$ -	\$ 55,000	3.8%	0.0%
734 SpEd - Tech Hardware	\$ 3,453	\$ 3,108	\$ 345	\$ 2,763	\$ 3,108	100.0%	0.0%
734 ESSER III - Tech Hardware	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
734 Digital Teaching & Learning Hardware	\$ 15,075	\$ -	\$ 15,000	\$ -	\$ 15,000	0.0%	0.0%
734 School Safety Grant	\$ -	\$ 5,616	\$ -	\$ 5,616	\$ 5,616	100.0%	13.0%
736 Technology Software	\$ 1,864	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
736 TSSA - Software	\$ 49,092	\$ 38,862	\$ 48,000	\$ -	\$ 48,000	81.0%	0.0%
736 LAND TRUST - Software	\$ 6,760	\$ 5,500	\$ 5,500	\$ -	\$ 5,500	100.0%	0.0%
736 SpEd - Software	\$ 1,680	\$ 2,771	\$ 1,800	\$ 971	\$ 2,771	100.0%	0.0%
736 School Safety Grant	\$ -	\$ 23,100	\$ -	\$ -	\$ -	0.0%	0.0%
739 Kitchen Equipment	\$ 23,440	\$ 643	\$ 23,440	\$ -	\$ 23,440	2.7%	0.0%
790 Cap Ex Fund	\$ 523,778	\$ 227,009	\$ 235,000	\$ -	\$ 235,000	96.6%	0.0%
Total 700:	\$ 731,343	\$ 424,110	\$ 433,081	\$ 108,918	\$ 541,999	78.2%	10.1%
800 Debt Service & Miscellaneous							
810 Dues and Fees	\$ 11,178	\$ 12,828	\$ 15,000	\$ -	\$ 15,000	85.5%	6.6%
830 Bond Restricted Assets (Interest)	\$ 500,913	\$ 313,008	\$ 469,513	\$ -	\$ 469,513	66.7%	14.3%
840 Bond Restricted Assets (Principal)	\$ 785,000	\$ 543,333	\$ 815,000	\$ -	\$ 815,000	66.7%	14.3%
833 Bond Fees	\$ 7,300	\$ 30,300	\$ 33,800	\$ -	\$ 33,800	89.6%	0.0%
890 Miscellaneous	\$ 3,419	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Total 800:	\$ 1,307,810	\$ 899,469	\$ 1,333,313	\$ -	\$ 1,333,313	67.5%	13.6%
Total Expenses:	\$ 9,499,275	\$ 6,847,154	\$ 10,143,524	\$ 285,701	\$ 10,374,059	66.0%	15.1%
Net Income:	\$ 689,835	\$ 348,496	\$ 255,164	\$ 195,439	\$ 514,401	67.7%	
					\$ 250,000		Restricted Forecasted Spend Down
					\$ 479,743		Food Service \$ (93,112)
					\$ 34,658		SpEd \$ 34,658
Cap Ex Fund:	At year end: \$ 168,402	At year end: \$ 168,402	At year end: \$ 168,402	Use: \$177,616	At year end: \$ 176,393		
(Unrestricted over \$350,000) Special Project Fund:	Beg of Year \$ 97,843	Beg of Year \$ 97,843	Beg of Year \$ 97,843		At year end: \$ 227,586		
Fund Reserve:		\$ 6,096,903			\$ 6,321,482		

GEORGE WASHINGTON ACADEMY

Balance Sheet

As of February 29, 2024

	<u>Feb 29, 24</u>
ASSETS	
Current Assets	
Checking/Savings	
1072 · Bill.com Money Out Clearing	86.74
8110 · Cash in Banks	
8111 · Cache Valley Bank Accounts	
1 · Petty Cash	179.07
8111.1 · Cache Valley Bank (2050)	683,823.09
8111.3 · Cache Valley Checking (8114)	81,063.98
Total 8111 · Cache Valley Bank Accounts	<u>765,066.14</u>
8116 · PTIF	6,395,046.37
8120 · US Bank Accounts	
8120.1C · Principal Fund 2015 (80001)	762,937.23
8120.2 · Interest Fund 2008 (9002)	0.02
8120.2B · Interest Fund 2011 (5001)	0.01
8120.2C · Interest Fund 2015 (80002)	265,717.58
8120.3C · Reserve Fund 2015 (80003)	1,285,912.50
8120.5C · Repair & Rplcmnt 2015 (80005)	150,000.00
8120.6C · Expense Fund 2015 (80006)	69,454.61
Total 8120 · US Bank Accounts	<u>2,534,021.95</u>
Total 8110 · Cash in Banks	<u>9,694,134.46</u>
Total Checking/Savings	<u>9,694,221.20</u>
Other Current Assets	
8130 · Accounts Recievable	
8135 · Utah State Sales Tax	2,951.66
Total 8130 · Accounts Recievable	<u>2,951.66</u>
8150 · Prepaid Expenses	6,659.00
Total Other Current Assets	<u>9,610.66</u>
Total Current Assets	<u>9,703,831.86</u>
TOTAL ASSETS	<u>9,703,831.86</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
9513 · Accounts Payable-bill.com	47,555.95
Total Accounts Payable	<u>47,555.95</u>
Credit Cards	
9531 · Visa Card	
9531a · VISA Card - Jessica's Card	5,542.89
9531b · VISA Card - Blake's Card	400.39
Total 9531 · Visa Card	<u>5,943.28</u>
9532 · Lowe's	-1,676.61
Total Credit Cards	<u>4,266.67</u>
Other Current Liabilities	
9510 · Accounts Payable	7,205.85
9530 · Accrued Liabilities	
9535 · Accrued Bond Liability	621,585.42
Total 9530 · Accrued Liabilities	<u>621,585.42</u>
9540 · Accrued Salaries & Withholdings	
9544 · Utah State Withholding	18,723.00

GEORGE WASHINGTON ACADEMY

Balance Sheet

As of February 29, 2024

	<u>Feb 29, 24</u>
9545 · Payroll Liabilities	
9545.0 · HSA	920.00
Total 9545 · Payroll Liabilities	<u>920.00</u>
Total 9540 · Accrued Salaries & Withholdings	19,643.00
9540a · Payroll & Benefit YE Accrual	311,884.10
9560 · Deferred Revenue	
9561 · Local	23,505.94
9563 · State	400,000.00
Total 9560 · Deferred Revenue	<u>423,505.94</u>
Total Other Current Liabilities	<u>1,383,824.31</u>
Total Current Liabilities	<u>1,435,646.93</u>
Total Liabilities	1,435,646.93
Equity	
30000 · Opening Balance Equity	193.93
9820 · Net Assets - Restricted	274,127.41
9830 · Retained Earnings	8,401,986.03
9850 · Unreserved Fund Balances	7,398.97
9859 · Undesignated Fund Balance	422,122.16
Net Income	-837,643.57
Total Equity	<u>8,268,184.93</u>
TOTAL LIABILITIES & EQUITY	<u><u>9,703,831.86</u></u>



PROPOSAL FOR BOARD ACTION

Proposal Title: HMH Math Curriculum

Submitted by: Christine Giles

Originating 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:

It is that time of the year when we plan for the purchase of consumable math curriculum materials and digital licenses required for instruction and learning. To proceed with this purchase, we seek the necessary permission from the Board of Directors, as detailed in the attached quote from Houghton Mifflin Harcourt (HMH). The materials outlined in the attached quote have been carefully chosen to align with our educational objectives and standards, ensuring a comprehensive and high-quality learning experience for our students.

Background Information, including a list of reviewing committees:

The HMH curriculum has demonstrated its effectiveness in equipping our K-7 teachers with materials that align seamlessly with the Utah State Standards for instruction. As a collaborative team, we are actively learning how to optimize the use of the HMH curriculum, and collectively, teachers and administration agree that it is the optimal choice for math curriculum in our GWA classrooms.

Assessment:

As we've engaged with state math trainers and participated in training sessions alongside other schools throughout the state, it has consistently reinforced our belief that HMH remains the most suitable curriculum to guide us through the 2024-2025 school year. The collaborative insights gained from these experiences further affirm our confidence in HMH as the optimal choice for our math curriculum in GWA classrooms, aligning with Utah State Standards.

Recommendation:

I propose that the Board of Directors approves the proposal and quote from HMH, recognizing our judicious approach to spending. We are committed to acquiring only the essential components of the curriculum that will effectively contribute to the desired student outcomes.

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



Submitted By: Christine Gites

Date: 7/1/24 Vendor: _____

Website/Contact Info: lthh

BILL/SHIP TO: George Washington Academy
2277 S. 3000 E.
St. George, UT 84790

This is a/an (Circle One):

Purchase Order/Invoice P.O. # 2024-303

School Credit Card Purchase

School Credit Card (Admin)

Authorization for Travel

Dates of Travel: _____

Reimbursement Request
(Fill Out Below & Attach all Receipts)

Teacher Supply Account Purchase? Y N

QTY	ITEM #	DESCRIPTION (include dates as applicable)	UNIT PRICE	LINE TOTAL
840	K-5	Digital student licenses	23.50	19,740
30		teacher digital		no cost
210	6-7	Digital student licenses	23.50	4,935
2		teacher digital		no cost
30		Digital student license accelerated	23.50	705.00
1		teacher digital accelerated		no cost
150		Gr K consumables	7.50	1,125.00
150		Gr 1 consumables	7.50	1,125.00
150		Gr 2 consumables	7.50	1,125.00
145		Gr 3 consumables	7.50	1,087.50
111		Gr 4 consumables	7.50	832.50
118		Gr 5 consumable unblok	7.50	885.00

Procurement:
If the item is over \$100 and/service is over \$1,000, you are required to request 3 bids.

Please attach all bids to this requisition and a brief explanation of why you chose the vendor.

Subtotal	\$ 35,149.75
Shipping	1,414.61
Sales Tax	
TOTAL	\$ 36,564.36

Budget Category: (Administration Only)

300 Professional & Technical Budget Detail: _____

400 Purchased Property Services Budget Detail: _____

500 Other Purchased Services Budget Detail: _____

600 Supplies & Materials Budget Detail: 641

700 Property Budget Detail: _____

Principal Discretionary Curriculum Student Incentives Special Education Land Trust CCA

Other: Bill - ship as of

Notes: July 1st 2024
24-25 school year

Executive Director's Approval (For purchases up to \$2,000) _____ Date _____

Approving Board Member (For purchases between \$2,001 - \$5,000) _____ Date _____

Board Chair or Board Member on Finance Committee (For purchases over \$5,000) _____ Date _____

*Purchases over \$5,000 MUST be approved in a board meeting



This is a/an (Circle One):

Purchase Order/Invoice P.O. # _____

School Credit Card Purchase

School Credit Card (Admin)

Authorization for Travel
Dates of Travel: _____

Reimbursement Request
(Fill Out Below & Attach all Receipts)

Teacher Supply Account Purchase? Y N

Submitted By: _____

Date: _____ Vendor: _____

Website/Contact Info: _____

BILL/SHIP TO: George Washington Academy
2277 S. 3000 E.
St. George, UT 84790

QTY	ITEM #	DESCRIPTION (include dates as applicable)	UNIT PRICE	LINE TOTAL
129		Gr 5 consumables Hmk	11.30	1,457.70
120		Gr 6 Consumables	7.50	900.00
90		Gr 7 Consumables	7.50	675.00
30		Gr 7 consumables accelerated	7.50	225.00
1		Gr 7 teacher accelerated Planning guide		20.45
1		Gr 7 teacher edition accelerated		145.00
1		Gr 7 Project cards accelerated		15.00
1		Gr 7 game activity accelerated		15.00
1		Gr 7 Flipchart accelerated		115.40

Budget Category: (Administration Only)

300 Professional & Technical Budget Detail: _____

400 Purchased Property Services Budget Detail: _____

500 Other Purchased Services Budget Detail: _____

600 Supplies & Materials Budget Detail: 641

700 Property Budget Detail: _____

Principal Discretionary Land Trust
Curriculum CCA

Student Incentives

Special Education

Other: Bill and ship as of

Notes: July 1st 2024
24-25 school year

Procurement:
If the item is over \$100 and/service is over \$1,000, you are required to request 3 bids.

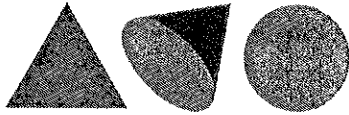
Please attach all bids to this requisition and a brief explanation of why you chose the vendor.

Subtotal	35,149.75
Shipping	1,410.41
Sales Tax	
TOTAL	\$36,560.16

Executive Director's Approval _____ Date _____
(For purchases up to \$2,000)

Approving Board Member _____ Date _____
(For purchases between \$2,001 - \$5,000)

Board Chair or _____ Date _____
Board Member on Finance Committee
For purchases over \$5,000
*Purchases over \$5,000 MUST be approved in a board meeting



Houghton Mifflin Harcourt

Proposal #008961522

Prepared For

George Washington Academy

Attention:

Christine Giles

cgiles@gwacademy.org

For the Purchase of:

Into Math K-7 + Accelerated (1 Year)

Prepared By

Ross Fannon

ross.fannon@hnhco.com

Please submit this proposal with your purchase order.

Purchase orders or duly executed service agreements for **Professional Services** purchased, must be submitted at least 30 days before the service event date.

For greater detail, the complete Terms of Purchases may be reviewed here:

<http://www.hnhco.com/common/terms-conditions>

Send **Check Payments** to:
Houghton Mifflin Harcourt Publishing Company
14046 Collections Center Drive
Chicago, IL 60693

Attention:
Christine Giles
cgiles@gwacademy.org

Send **Orders** to:
orders@hnhco.com
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Proposal for George Washington Academy Into Math K-7 + Accelerated (1 Year)

ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
Grade K					
Student Digital Licenses					
1789205	9780358396529 Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses		\$3,290.00			
Teacher Digital Licenses					
1808532	9780358555766 Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses		\$0.00			
A la Carte Items Available for Purchase					
Student Materials					
1756049	9780358153689 Into Math Student Edition Collection Grade K	\$7.50	150	\$1,125.00	
Total for A la Carte Items Available for Purchase		\$1,125.00			

Total for Grade K **\$4,415.00**

Grade 1					
Student Digital Licenses					
1789205	9780358396529 Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses		\$3,290.00			
Teacher Digital Licenses					
1808532	9780358555766 Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses		\$0.00			
A la Carte Items Available for Purchase					
Student Materials					
1814896	9780358608493 2020 Into Math Student Edition Collection with Practice and Homework Journal Set Grade 1	\$7.50	150	\$1,125.00	
Total for A la Carte Items Available for Purchase		\$1,125.00			

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ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
Total for Grade 1				\$4,415.00	
Grade 2					
Student Digital Licenses					
1789205	9780358396529 Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses				\$3,290.00	
Teacher Digital Licenses					
1808532	9780358555766 Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses				\$0.00	
A la Carte Items Available for Purchase					
Student Materials					
1814897	9780358608509 2020 Into Math Student Edition Collection with Practice and Homework Journal Set Grade 2	\$7.50	150	\$1,125.00	
Total for A la Carte Items Available for Purchase				\$1,125.00	
Total for Grade 2				\$4,415.00	

Grade 3					
Student Digital Licenses					
1789205	9780358396529 Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses				\$3,290.00	
Teacher Digital Licenses					
1808532	9780358555766 Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses				\$0.00	
A la Carte Items Available for Purchase					
Student Materials					

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ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
1814898 9780358608516	2020 Into Math Student Edition Collection with Practice and Homework Journal Set Grade 3	\$7.50	145	\$1,087.50	
Total for A la Carte Items Available for Purchase				\$1,087.50	
<hr/> Total for Grade 3				\$4,377.50	
Grade 4					
Student Digital Licenses					
1789205 9780358396529	Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses				\$3,290.00	
Teacher Digital Licenses					
1808532 9780358555766	Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses				\$0.00	
A la Carte Items Available for Purchase					
Student Materials					
1814899 9780358608523	2020 Into Math Student Edition Collection with Practice and Homework Journal Set Grade 4	\$7.50	111	\$832.50	
Total for A la Carte Items Available for Purchase				\$832.50	
<hr/> Total for Grade 4				\$4,122.50	
Grade 5					
Student Digital Licenses					
1789205 9780358396529	Into Math Student License Digital 1 Year Grades K-5 Includes: Digital Student Resources 1 Year Digital Grade K-5 Implementation Success	\$23.50	140	\$3,290.00	
Total for Student Digital Licenses				\$3,290.00	
Teacher Digital Licenses					
1808532 9780358555766	Into Math Teacher License Digital 1 Year Grades K-5 Includes: Into Math Digital Teacher Resources 1 Year Grades K-5 Access to Teacher's Corner	\$150.00			5
Total for Teacher Digital Licenses				\$0.00	
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Proposal for George Washington Academy Into Math K-7 + Accelerated (1 Year)

ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
A la Carte Items Available for Purchase					
Student/District Materials					
1756064	9780358153733 2020 Into Math Student Edition Collection Grade 5	\$7.50	118	\$885.00	
1749309	9780358111566 Into Math Practice and Homework Journal Grade 5	\$11.30	129	\$1,457.70	
Total for A la Carte Items Available for Purchase				\$2,342.70	
Total for Grade 5				\$5,632.70	
Grade 6					
Student Digital Licenses					
1789206	9780358396536 Into Math Student License Digital 1 Year Grades 6-8 Includes: Digital Student Resources 1 Year Digital Grade 6-8 Implementation Success	\$23.50	120	\$2,820.00	
Total for Student Digital Licenses				\$2,820.00	
Teacher Digital Licenses					
1808544	9780358556889 Into Math Teacher License Digital 1 Year Grades 6-8 Includes: Into Math Digital Teacher Resources 1 Year Grades 6-8 Access to Teacher's Corner	\$150.00			1
Total for Teacher Digital Licenses				\$0.00	
A la Carte Items Available for Purchase					
Student Materials					
1750405	9780358115816 Into Math Student Edition (Consumable) Grade 6	\$7.50	120	\$900.00	
Total for A la Carte Items Available for Purchase				\$900.00	
Total for Grade 6				\$3,720.00	
Grade 7					
Student Digital Licenses					
1789206	9780358396536 Into Math Student License Digital 1 Year Grades 6-8 Includes: Digital Student Resources 1 Year Digital Grade 6-8 Implementation Success	\$23.50	90	\$2,115.00	
Total for Student Digital Licenses				\$2,115.00	
Teacher Digital Licenses					
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ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
1808544	9780358555889 Into Math Teacher License Digital 1 Year Grades 6-8 Includes: Into Math Digital Teacher Resources 1 Year Grades 6-8 Access to Teacher's Corner	\$150.00			1
Total for Teacher Digital Licenses		\$0.00			
A la Carte Items Available for Purchase					
Student Materials					
1705761	9781328951809 Into Math Student Edition (Consumable) Grade 7	\$7.50	90	\$675.00	
Total for A la Carte Items Available for Purchase		\$675.00			
Total for Grade 7		\$2,790.00			
<u>Accelerated 7</u>					
Student Digital Licenses					
1789206	9780358396536 Into Math Student License Digital 1 Year Grades 6-8 Includes: Digital Student Resources 1 Year Digital Grade 6-8 Implementation Success	\$23.50	30	\$705.00	
Total for Student Digital Licenses		\$705.00			
Teacher Digital Licenses					
1808544	9780358555889 Into Math Teacher License Digital 1 Year Grades 6-8 Includes: Into Math Digital Teacher Resources 1 Year Grades 6-8 Access to Teacher's Corner	\$150.00			1
Total for Teacher Digital Licenses		\$0.00			
A la Carte Items Available for Purchase					
Teacher Materials					
1750439	9780358116356 Into Math Planning and Pacing Guide Accelerated 7	\$20.45	1	\$20.45	
1756250	9780358157083 Into Math Teacher Edition Collection Accelerated 7	\$165.00	1	\$165.00	
1750457	9780358116530 Into Math Unit Project Cards Accelerated 7	\$15.60	1	\$15.60	
1750463	9780358116592 Into Math Game and Activity Cards Accelerated 7	\$15.60	1	\$15.60	
1750433	9780358116295 Into Math TE Flipchart Accelerated 7	\$115.40	1	\$115.40	
Student Materials					
1750409	9780358116059 Into Math Student Edition (Consumable) Accelerated 7	\$7.50	30	\$225.00	
Total for A la Carte Items Available for Purchase		\$557.05			

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ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
Total for Accelerated 7		\$1,262.05			

<i>Subtotal Purchase Amount:</i>	\$35,149.75
<i>Shipping & Handling:</i>	\$1,416.61
<i>Sales Tax:</i>	\$0.00
Total Cost of Proposal (PO Amount):	\$36,566.36

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Total Cost of Proposal (PO Amount): \$36,566.36

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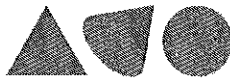
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Bill To: George Washington Academy Attn: Office 2277 S 3000 E St George, UT 84790		Ship To: George Washington Academy Attn: Office 2277 S 3000 E St George, UT 84790	
Account Number 511203 Date 03/07/2024	Draft Number 97365		

Line #	Pub	ISBN-13	Description	Ty	Yr	Qty	Price	Amount
(1)	HMH	9780358396529	Into Math K-5 Student Digital 1Yr OLA	OX	20	840	23.50	19740.00
(2)	HMH	9780358555766	Into Math K-5 Teacher Digital 1Yr OLA	OX	20	30	150.00	4500.00
(3)	HMH	9780358396536	Into Math 6-8 Spanish Student Licensce Digtial 1Yr	OX	20	240	23.50	5640.00
(4)	HMH	9780358396536	Into Math 6-8 Spanish Student Licensce Digtial 1Yr	OX	20	2	23.50	47.00
(5)	HMH	9780358153689	Into Math K SE Collection	TX	20	150	26.50	3975.00
(6)	HMH	9780358608493	Into Math 1 SE Collection w/Practice/Homework Journal Set	TX	20	150	32.15	4822.50
(7)	HMH	9780358608509	Into Math 2 SE Collection w/Practice/Homework Journal Set	TX	20	150	32.15	4822.50
(8)	HMH	9780358608516	Into Math 3 SE Collection w/Practice/Homework Journal Set	TX	20	145	32.15	4661.75
(9)	HMH	9780358608523	Into Math 4 SE Collection w/Practice/Homework Journal Set	TX	20	111	32.15	3568.65
(10)	HMH	9780358153733	Into Math 5 SE Collection	TX	20	118	26.50	3127.00
(11)	HMH	9780358111566	Into Math 5 Practice/Homework Journal	WB	20	129	11.30	1457.70
(12)	HMD	9780358115816	Into Math 6 SE	TX	20	120	26.50	3180.00
(13)	HMD	9781328951809	Into Math 7 SE	TX	20	90	26.50	2385.00
(14)	HMD	9780358116059	Into Math 7 Accelerated SE	TX	20	30	28.20	846.00
(15)	HMD	9780358116356	Into Math 7 Accelerated Planning/Pacing Guide	TR	20	1	20.45	20.45
(16)	HMD	9780358157083	Into Math 7 Accelerated TE Collection 2Pt	TE	20	1	165.00	165.00
(17)	HMD	9780358116530	Into Math 7 Accelerated Unit Project Cards	VA	20	1	15.60	15.60
(18)	HMD	9780358116592	Into Math 7 Accelerated Game/Activity Cards	VA	20	1	15.60	15.60
(19)	HMD	9780358116295	Into Math 7 Accelerated Tabletop Flipchart	VA	20	1	115.40	115.40



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DRAFT QUOTE

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Account Number 511203 Date 03/07/2024	Draft Number 97365							
Line #	Pub	ISBN-13	Description	Ty	Yr	Qty	Price	Amount

Comments:

Subtotal	63,105.15
Shipping	1,144.65
Sales Tax	0.00
Estimated Total	\$64,249.80

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 All No Charge items are subject to approval.
 A convenience fee will be applied to credit card orders.



PROPOSAL FOR BOARD ACTION

Proposal Title: Chromebook Replacement Plan

Submitted by: Steve Erickson

Originating Committee: Technology

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:

Continued replacement of older chromebooks.

Background Information, including a list of reviewing committees:

We are replacing roughly 173 chromebooks each year as they get older.

Assessment:

Recommendation:

Please accept the purchase of chromebooks as part of our replacement plan. We recommend going with the cheapest quote for the Lenovo 100e's since all quotes are for the same make and model.

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

Quote Details [Print](#)

Quote Number: 244420279

Billing Address	Jessica Bentley George Washington Academy 2277 S 3000 E ST GEORGE, UT 84790 Phone 435-673-2232	Shipping Address	Jessica Bentley George Washington Academy 2277 S 3000 E ST GEORGE, UT 84790 Phone 435-673-2232
------------------------	--	-------------------------	--

Qty	Product Description	Availability	Delivery Address	Price	Total Price
173	Lenovo 100e Chromebook Gen 3 - 11.6" - Intel Celeron - N4500 - 4 GB RAM - 32 GB eMMC - English Catalog Open Market Item BB21985802 Manufacturer 82UY0000US Standard Delivery	In Stock	Shipping Address Ship to my address	\$229.99	\$39,788.27
173	Google Chrome OS Management Console - license - 1 license Catalog Open Market Item BB21691687 Manufacturer CROSSWDISEDUNEW Standard Delivery	Call to order	Shipping Address Ship to my address	\$31.52	\$5,452.96

Product Total:	\$45,241.23
Standard Delivery:	\$0.00
Tax:	\$3,053.78

QUOTE TOTAL: \$48,295.01

Expiration Date

- 04/06/24

Shipping Method(s)

- (Instructions:)

Payment Type

- Business Advantage Account*****5467

Best Buy For Business is pleased to provide the quote you requested. We realize you have numerous options for procuring IT Products and appreciate that you contacted us. We will honor the prices on this quote through the expiration date identified above.

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Quote



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SHIP TO
Mr Jessica Bentley George Washington Academy George Washington Academy Jessica Bentley 2277 S.3000 E, St George , UT 84790 USA

QUOTE #	DATE
1846	03/05/2024

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	LEN-82UY0000US	Lenovo 100e G3, Intel Celeron N4500 (1.10GHz,), 11.6 1366 x 768 Non-Touch, Chrome OS, 4.0GB, 1x32GB eMMC, Intel UHD Graphics, Bluetooth 5.0,WiFi6 AX201 2x2, 720PMic&Shutter, 3 Cell Li-Pol 42Wh, 1 Year Mail-in	173	233.00	40,309.00
	GOG-CROS-SW-DIS-EDU	Google Management Console for Education	173	30.08	5,203.84
	Freight	Free Shipping and Net 30 Day Terms Included	1	0.00	0.00

TOTAL

\$45,512.84

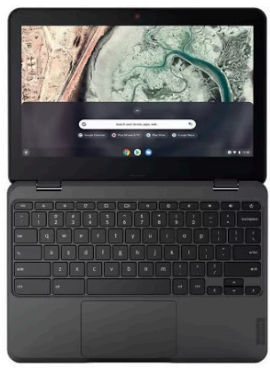
Accepted By

Accepted Date



Lenovo 100e Chromebook Gen 3 - 11.6" - Intel Celeron - N4500 - 4 GB RAM - 32 GB eMMC - English

MFG.PART: 82UY0000US CDW PART: 6951647 UNSPSC: 43211503



~~\$269.00~~ Save \$26.01

\$242.99

Advertised Price

Not Yet Reviewed ☆☆☆☆☆ (0)

173

Availability: Item Backordered
This item will ship once it is in stock. CDW cannot guarantee an in-stock date.

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PROPOSAL FOR BOARD ACTION

Proposal Title: George Washington Academy Board Clerk Job Description

Submitted by: Shannon Greer

Originating Committee: Board Development 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:

In an effort to simplify the role the PTO plays at the school it was determined that by offloading the sponsorships their responsibilities would be more manageable.

Background Information, including a list of reviewing committees:

The board currently utilizes the services of a paid board clerk for up to 10 hours a month. The PTO felt that they spent between 20-30 hours a month on sponsorships for the months of July-October, and there has been a lot of PTO turnover over the past 4 years.

This proposal has been reviewed by the PTO President, Shannon and Blake.

Assessment:

Recommendation:

It is our recommendation that we, the GWA board, absorb the responsibility of the GWA board sponsorships and assign those responsibilities to the Board Clerk. If this proposal is approved by the board the position will be posted and the hiring process will begin with a goal of having an individual in place by the May board meeting.

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

George Washington Academy Board Clerk Job Description

Job Title: GWA Board of Directors, Clerk

Compensation: \$22.00 hourly

Time commitment: Up to 15 hours a month after training. Additional time must be approved by the School Board Chair.

ROLE AND RESPONSIBILITIES MAY INCLUDE, BUT ARE NOT LIMITED TO:

1. Board Meeting Preparation

- Post notices of Board Meetings on the Public Notice Website.
- Prepare Board Meeting Agenda and Board Packet and approve with the Board Chair.
- Email Agenda and Board Packets out to Board Members, Director and Teacher Reps the Monday before Board Meeting.

2. Attend All Board Meetings

- Prepare the meeting room with the Public Meeting Sign-up Sheet, Agendas and Handouts, as directed by the Board Chair.
- Bring recording device(s).
- Take notes during the meeting.
- Keep a copy of any handouts passed out to the board.

3. Post-Meeting Responsibilities

- Review minutes with the Board Chair.
- Post minutes and recording on the Public Notice Website within 3 business days of the board meeting.
- Ensure the posting of pending minutes and recording on George Washington Academy's website within 3 business days of the board meeting.

4. Maintain Records

- Keep a copy of meeting recordings.
- Keep records of the meeting agendas, minutes, and handouts.
- Maintain copies of Board Member Conflict of Interest Forms.
- Maintain a record of training the board has participated in.
- Maintain the audio recording of each meeting.

5. Managing GWA Sponsorships

- Create new sponsorship application forms and letters for the 2024-2025 year.
- Initiate contact with potential sponsors each June, negotiate and manage sponsorship throughout the year.
- Manage banner design, ordering and placement.
- Manage donor plaques
- Manage the ordering of GWA Spirit T-shirts.
- Work with sponsors on participation in the Fall Fest Event.
- Create and coordinate the delivery of hand-written thank you cards/gifts to each sponsor.

6. Annual Items

- Maintain Board Meeting Schedule, ensure that info is updated on the school website.
- Participate in an Annual Board Retreat.

QUALIFICATIONS AND EDUCATION REQUIREMENTS

High School Graduate, preferably a minimum of an Associate's Degree.

PREFERRED SKILLS

Previous Board Experience, ability to use Microsoft Word, familiar with the Utah Public Notice Website, understand Utah Open and Public Meetings Act, have a working knowledge of Robert's Rules of Order, previous experience in sponsorship coordination or related roles preferred, strong organizational and time-management skills, excellent communication and interpersonal abilities, proficiency in spreadsheet software for tracking and reference, the ability to work independently and collaboratively.

THE POSITIONS WILL REPORT DIRECTLY TO THE CHAIR OF THE BOARD OF DIRECTORS.



PROPOSAL FOR BOARD ACTION

Proposal Title: Firewall Replacemnt

Submitted by: Steve Erickson

Originating Committee: Technology

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:

Our Firewall is out of date and needs to be replaced.

Background Information, including a list of reviewing committees:

This hardware is on our plan to replace this year. It was expected that this would be over a \$10,000 purchase. There is a promotion going and we want to jump on it. This should help with our Wifi as well.

Assessment:

Recommendation:

Tech Committee recommends going with the cheapest bid since it is comparable product.

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

Superior Technical Solutions

3588 Church Rocks Dr
Saint George, UT 84790
(435) 574-9311
john@stsutah.com
http://www.stsutah.com



Estimate

ADDRESS

George Washington Academy
2277 S 3000 E
St George, UT 84790 USA

SHIP TO

George Washington
Academy
2277 S 3000 E
St George, UT 84790 USA

ESTIMATE # 1078

DATE 03/07/2024

ACTIVITY	QTY	RATE	AMOUNT
Hardware Consult Firewall XGS 2100 - S4H7FS101A01D Physical Device (March Madness- 99% off hardware with 3 year subscription)	1	22.49	22.49
Hardware Consult Firewall Licensing - S4HZPV201L05D - Sophos XGS 2100 Xstream Protection - 39 Months - Education	1	6,524.99	6,524.99
SUBTOTAL			6,547.48
TAX			0.00
TOTAL			\$6,547.48

Accepted By

Accepted Date



QUOTE

9979 Muirlands Blvd, Irvine CA 92618
www.blueally.com | insidesales@blueally.com
Tel: 949.870.3500 | FAX: 949.266.9332

Quote #: 445785
Date: 03/19/2024

Billing Address

George Washington Academy
2277 South 3000 East

St. George UT 84790
USA

Shipping Address

George Washington Academy
2277 South 3000 East

St. George UT 84790
USA

Customer ID: 87034762
Customer Ref. No.:

Salesperson: Harold Bugarin
Shipping Method:

QTY	ITEM	DESCRIPTION	UNIT PRICE	TOTAL
** Sophos Hardare Promo **				
1	XS210039ZZNEAA	Sophos, INC.:XGS 2100 XSTREAM PROTECTION - 39 MOS - EDU	\$ 6,603.00	\$6,603.00
1	XG2ATCHUS	Sophos XGS 2100 Security Appliance - US power cord	0.00	
Appliance and 3yr Xstream Protection with Additional 3 mos				

Quotation Subtotal \$ 6,603.00

Total Tax \$ 445.71

Quotation Total \$ 7,048.71

Quotation Valid Until: 04/19/24

To securely submit payment for this quote via credit card, please visit:
<https://secure.blueally.com/SecurePayment/SecurePayment/445785/87034762>

RETURN POLICY: All Returns must meet all applicable criteria listed in our Return Policy found at <https://www.BlueAlly.com/returns>.

For approval please contact the sales representative listed on this invoice.

* All Claims for shortage, damaged or shipping errors must be made within 3 days of receipt.

* All sales have a 30 day return period unless noted otherwise.

* No cash refunds.

* Non-defective items returned subject to 15% restocking fee.

* Warranties void if labels removed or tampered with.

* Returns must include all original packaging and include all accessories & documentation.

* All software and license downloads are not returnable. All sales are final when software has been registered, activated or used.



Solution Summary

Sophos

Customer: General Washington Academy	Primary Contact: Jessica Bentley
Ship To Address: 2277 S 3000 E St George, UT 84790	Email: jbentley@gwacademy.org
	Phone: 435-673-2232
Customer ID:	National Account Manager: Mark Christianson
Customer PO:	Email: MChristianson@onec1.com
	Phone: +18017436208

Solution Summary	Billing Frequency	Due	Total Project
Software	One-Time	\$8,905.14	\$8,905.14
Hardware	One-Time	\$2,789.44	\$2,789.44
Project Subtotal			\$11,694.58
Estimated Tax			NOT INCLUDED
Estimated Freight			NOT INCLUDED
Project Total			\$11,694.58

This Solution Summary summarizes the document(s) that are attached hereto and such documents are incorporated herein by reference (collectively, this "Order"). Customer's signature on this Order (or Customer's issuance of a purchase order in connection with this Order) shall represent Customer's agreement with each document in this Order and acknowledgement that such attached document(s) are represented accurately by this Solution Summary.

Unless otherwise specified in this Order, this Order shall be subject to the following terms and conditions (the "Agreement"): (i) the Master Sales Agreement or other applicable master agreement in effect as of the date hereof between ConvergeOne, Inc. and/or its subsidiaries and affiliates (collectively, "C1" or "Seller") and Customer; or (ii) if no such master agreement is currently in place between C1 and Customer, the Online General Terms and Conditions currently found on the internet at: <https://www.onec1.com/agreements> . If Customer's Agreement is a master agreement entered into with one of C1 predecessors, affiliates and/or subsidiaries ("Legacy Master Agreement"), the terms and conditions of such Legacy Master Agreement shall apply to this Order, subject to any modifications, located at: <https://www.onec1.com/agreements> . In the event of a conflict between the terms and conditions in the Agreement and this Order, the order of precedence shall be as follows: (i) this Order (with the most recent and specific document controlling if there are conflicts between the Solution Summary and any applicable supporting document(s) incorporated into this Order), (ii) Attachment A to the Agreement (if applicable), and (iii) the main body of the Agreement.

This Order may include the sale of any of the following to Customer: (a) any hardware, third party software, and/or Seller software (collectively, "Products"); (b) any installation services, professional services, and/or third party provided support services that are generally associated with the Products and sold to customers by Seller (collectively, "Professional Services"); (c) any Seller-provided vendor management services, software release management services, remote monitoring services and/or, troubleshooting services (collectively, "Managed Services"); and/or (d) any Seller-provided maintenance services ordered by Customer to maintain and service Supported Products or Supported Systems at Supported Sites to ensure that they operate in conformance with their respective documentation and specifications (collectively, "Maintenance Services"). For ease of reference only, Professional Services, Managed Services and Maintenance Services may be referred to collectively as "Services." Unless otherwise defined herein, capitalized terms used herein will have the same meanings as set forth in the Agreement.

Products and/or Services not specifically itemized are not provided hereunder. This Order will be valid for a period of thirty (30) days following the date hereof. Thereafter, this Order will no longer be of any force and effect. Due to rapidly changing prices in the market for third party Products and/or Services, after the expiration of the foregoing 30 day period, Seller reserves the right to adjust offerings and/or prices accordingly prior to issuing any new Order(s).

This Order is a configured order and/or contains software.

ACCEPTED BY:

BUYER: _____ DATE: _____ SELLER: _____ DATE: _____
 TITLE: _____ TITLE: _____



Date: 3/20/2024

Page #: 2 of 2

Documents #: OP-000801834

SO-000903016

Solution Name: Sophos

Customer: General Washington
Academy

Solution Quote

#	Item Number	Description	Term In Months	Qty	Unit Price	Extended Price
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Software						
1	XS210036ZZNEAA	XGS 2100 XSTREAM PROTECTION 36 MOS EDU	36	1	\$8,905.14	\$8,905.14

Hardware						
2	XG2ATCHUS	XGS 2100 SECURITY APPL US POWER CORD		1	\$2,789.44	\$2,789.44
		Country of Origin: N/A				
		Weight:				
		Dim Weight:				



PROPOSAL FOR BOARD ACTION

Proposal Title: Talkspace

Submitted by: Debbie Kauvaka

Originating Committee: Benefits Committee (passed through Finance 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:

The Benefits Committee has voted to provide all GWA employees with an online, user-friendly app service for mental health support called Talkspace. This service offers convenient and confidential virtual coaching/therapy sessions, as well as self-guided classes and more.

Background Information, including a list of reviewing committees:

We have seen an increased need for mental health services for our employees and their families. Currently we have an Employee Assistance Program for all employees which is a phone based mental health therapy service. This service has been underused due to employees feeling it is not as accessible or personal enough. A virtual mental health service is more accessible and offers more flexibility to access support when needed. There are a wide range of services offered including virtual coaching/therapy sessions, self-guided classes, and other resources that can help employees manage their mental health more effectively.

Assessment:

We have looked into other virtual mental health companies and chose Talkspace due to the ease of access to various resources, personalized individual therapist matching, unlimited messaging, on-demand and live classes, real-time usage reports, etc. We are asking to purchase the Standard Bundle at \$40,000 plus the Optional Add-on for Dependents at \$12,000 for a total of \$52,000. We would like to try this for a year and assess the usage and need after that time to decide on continued usage.

Recommendation:

Review the attached pricing and proposal information and approve to \$52,000 per year to begin this service August 1, 2024.

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

GWA Procedure for Processing and Approving Purchase Requisitions

1. All employees must complete a Purchase Requisition for approval prior to purchasing items. Teachers may purchase items for their classroom out of their teacher accounts and then complete the form for reimbursement, but must follow guidelines for Teacher Supply Accounts (classroom supplies and materials only). Requests for ALL REIMBURSEMENTS must be approved by the Executive Director.

2. After completing all necessary information, place the completed requisition form in the Purchasing Secretary's box. If an error occurs when filling out the document, it must be corrected with a single line through the error and initialed. No white-out may be used.

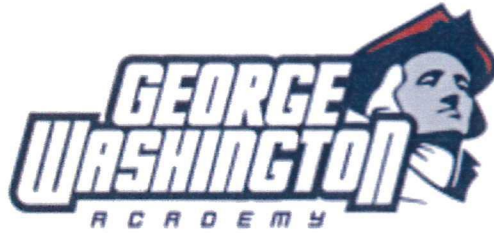
3. The Purchasing Secretary will then complete the following steps:
 - a. Verify that the Purchase Requisition is filled out completely, including Name, Date, Quantity, Description, Item #, Cost, and Company Information
 - b. Verify that the funds are available in the budget for the purchase or reimbursement.
 - c. Enter request into the Purchase Order Log.
 - d. Forwards the requisition to the individual(s) authorized to approve purchase requests.

4. When a Purchase Requisition is presented for approval, the individual(s) authorized to do so must:
 - a. Verify the Purchase Requisition is filled out completely, including Name, Date, Quantity, Description, Item #, Cost, and Company Information
 - b. Verify, when questions exist, that the purchase meets the needs of the school.
 - c. Verify that the funds are available in the budget for the purchase.
 - d. Places the approved requisition in the Purchasing Secretary's box

5. The Purchasing Secretary will then complete the following steps:
 - a. Verify that all appropriate signatures are on the Purchase Request. If a Travel/Meeting Request Estimate is included, Purchasing Secretary will book arrangements
 - b. Place the order with the vendor
 - c. Emails the Requestor that the item has been ordered and an estimated delivery date

*****IMPORTANT:**

Items that have been delivered **MUST** be received by the Purchasing Secretary **BEFORE** you pick them up. This is a very important part of our purchasing system. If it is an absolute emergency, the Executive Director or Administrative Services Director are the only ones who can approve you taking these items before due process has taken place with the Purchasing Secretary.



Pricing and Services Proposal



Therapy | **Psychiatry** | Self-Guided Care

Date: 02/23/2024



About Talkspace

The world around us is evolving quickly, accelerating the underlying issues that affect our capacity to be productive, healthy, and happy. Millions of Americans live with a mental health issue, yet most of them won't get the care they need. Company leaders can remove barriers to mental health care—like cost, stigma, and accessibility—and lead their organizations to greater engagement, productivity, and savings.

Founded in 2012, Talkspace was built to transform what it means to access mental health care. We believe that everyone should have access to licensed, high-quality clinicians, whether they're looking for general guidance or struggling with a mental illness. With a managed national network of licensed mental health professionals, Talkspace provides convenient and personalized support that leads to meaningful change. 3 million people have chosen Talkspace because our services are convenient, confidential, and secure (HIPAA, HITECH, SOC-2, WCAG). Our client list includes the nation's leading employers, municipalities, technology companies, universities, retailers, and health insurers, among others. We are proud to work with organizations that recognize the impact that accessible behavioral healthcare has on total medical cost and workplace well-being.

What sets Talkspace apart

Access to a managed, national network

Every member is matched to a dedicated, licensed provider who meets their preferences. Our QuickMatch™ recommendation engine selects the best-matched provider based on a combination of clinical need, preferences, and state of residence. By simplifying the navigation to find available providers, individuals can begin their care journey within days of registration.

Our network includes thousands of experienced, high-quality therapists and prescribers across all 50 states. All providers have obtained at least a masters' degree and are licensed, insured, and verified according to NCQA standards. The Talkspace network is diverse – providers over 180 clinical specialties, and more than 33% self-identify as BIPOC. We empower providers with transparent feedback and performance reviews from their clients, ensuring that all individuals receive the highest quality of care.



Proven efficacy

As the leader in peer-reviewed efficacy research, we prove the quality and validation of our treatment methods through measurable, clinical outcomes. 70% of Talkspace individuals see significant symptom improvement in less than 12 weeks¹. In a study with Columbia University and published in the Journal of Technology in Behavioral Science, message-based therapy resulted in a 36% increase in employee productivity and 50% fewer work hours missed². As the recipient of 3 NIH grants to fund \$10M in clinical research and 16 published studies, clinical research remains our top priority to continue advancing the field of virtual behavioral healthcare.

High engagement and satisfaction

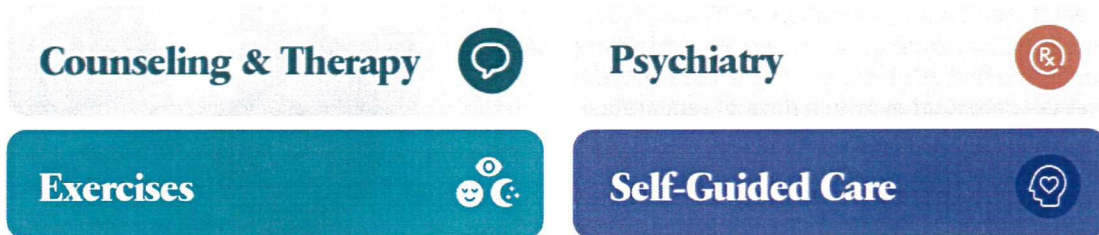
Talkspace offers a flexible approach to care. With asynchronous text, audio, or video messaging as well as scheduled live sessions, individuals engage in care when they need it rather than waiting for a weekly appointment. All individuals receive a private, secure digital therapy room with their provider. Product features are transparent; individuals can receive reminders, review treatment plans, track care progress, and access complementary self-care resources. 50% of individuals on the platform are seeking mental health care for the first time.

¹ <https://bmcpyschiatry.biomedcentral.com/articles/10.1186/s12888-020-02721-x>

² <https://link.springer.com/article/10.1007/s41347-018-0064-4>

Portfolio Overview

With a comprehensive, multidisciplinary approach, we support individuals wherever they are in their care journey—providing access to self-guided programs and tools, counseling and therapy, and psychiatric medication management. Our service suite effectively addresses a range of behavioral health needs:



Counseling & Therapy

Therapy is at the core of what we do, providing support for individuals. Once individuals (aged 13+) are matched with a dedicated, licensed therapist, they can start communicating via unlimited messaging and scheduled live sessions (video, chat, audio). On average, members can expect to be matched to a licensed provider and begin communications within days.

Psychiatry

Individuals who combine therapy and medication together see the highest recovery rate. Via live video appointments, individuals (aged 18+) can access initial consultation, assessment, evaluation, and diagnosis along with follow-up and ongoing medication management with an in-state licensed prescriber. Talkspace therapists and prescribers communicate and share notes with each other directly through the platform, alleviating the burden on the individual to share treatment plans across providers. Once registered, individuals can have their first session within 10 days on average—all from the privacy and comfort of home.

Self-Guided Care

Talkspace is committed to expanding self-guided solutions through evidence-based programs. Designed to meet your employees where they are, Self-Guided empowers individuals, couples, and parents to take progress into their own hands. Our clinically supported programs utilize the most effective therapeutic approaches that benefit both one's work and personal life—covering topics for anxiety, depression, burnout, and parenting. Live weekly classes, led by licensed therapists, are available to tackle subjects such as: *Finding Purpose and Passion*, *Taking Ownership of Your Career*, and *Helping Teens with Perfectionism*. 73% of individuals report greater self-awareness from just 20 minutes of use per day, 79% say it helped them parent more effectively, and 90% of couples who use self-guided features together report new relationship strengths.

Exercises

A variety of self-directed exercises, such as meditation and journaling, are available on Talkspace as a supplement to therapy. Enterprise clients receive access to a library of mental health resources (e.g., webinars, blog posts, handouts) to share with their team. These materials assist in education and awareness around mental and emotional well-being and the resources available to them.

How we get you results

Implementation

As a Talkspace customer, you'll benefit from our strategic account services team. Beginning with a successful implementation, we deploy a structured, relationship-based approach based on client goals, timelines, and stakeholder involvement. Our efficient implementation process, completed in as little as four weeks, allows you to quickly give your employees access to mental health support.

Account management

George Washington Academy will have a direct line to our customer success team to handle any day-to-day issues or concerns. The customer success team works toward the healthy direction of the program on all levels and your company will receive the quarterly report and ongoing support.

Communications and reporting

Communications support is available through collaborative initiatives, educational resources, and content that builds awareness and educates employees about the benefit. The Talkspace Communications Portal features product overviews and information as well as an assortment of timely mental health content. In addition to these self-serve marketing materials, **George Washington Academy** will receive periodic updates from Talkspace, including a quarterly newsletter, and have access to our library of mental health awareness webinars.

Talkspace is committed to providing meaningful, outcomes-driven data and ongoing utilization insights. Our reports will help **George Washington Academy** benchmark populations, analyze shifts, and inform your overall healthcare strategy. On a monthly basis, counts of registered members are automatically posted to a secure and HIPAA-compliant online folder. At the end of the year, an aggregated annual report is provided that illustrates engagement and outcomes for the client's population.



Summary

As a pioneer in virtual behavioral health, our comprehensive and multidisciplinary solution removes top barriers to care for your employees. Talkspace meets members wherever they are in their care journey, from any device and any location. Our evidence-based, data-driven approach leads to high-quality care from a clinically validated nationwide network. To date, more than 3 million people have trusted Talkspace to care for their mental health in a way that matches their unique lifestyle and preferences. Let us help you offer your employees accessible, high-quality mental health care that meets them where they are.

Talkspace Services

Therapy

- Uncapped utilization: 12 months of unlimited messaging
- Intake assessment
- Personalized individual therapist match
- Asynchronous therapy via text, audio, & video messaging (unlimited # of messages)
- Interactive surveys & progress goal tools
- Live sessions (video, audio, chat)
- Exercises: CBT/DBT programs, meditation, deep breathing
- Ages 13+

Psychiatry

- Initial one-hour consultation and assessment
- Intake assessment
- Personalized individual prescriber match
- Diagnosis
- Prescribing
- Medication management with monthly follow-up sessions
- All sessions conducted via live video appointment
- Ages 18+

Self-guided Care

- Self-guided therapy and wellness program for individuals, couples, or families
- Initial assessment
- Curated programming
- 800+ modules
- 2-4 live classes weekly led by therapists
- 100+ hours of video classes
- **Talkspace Engage portal access**
 - Clinician-curated mental health resources, organized by monthly themes
 - Access to full library of resources - hundreds of topics for all types of employees
 - Content includes live classes, on-demand classes, therapist worksheets, quick tips
 - On-demand reporting to view activation, engagement, and product usage in real-time

All of the above services include:

Reporting

- Aggregate penetration and utilization
- Engagement metrics
- Diagnostic breakdown
- Aggregate clinical metrics
- Outcome analysis
- Trends and strategy recommendations
- Satisfaction and user experience review

Marketing content & collateral

- Dedicated welcome page
- Communications portal
- Launch awareness collateral, content calendar
- Email, social media, blog, other mediums applicable for **George Washington Academy**

Plans & Pricing

- For small businesses Talkspace offers a minimum annual spend option, billed monthly

Talkspace Premium Bundle

Our most comprehensive mental health solution

Includes: Therapy (unlimited messaging +1 live session/mo.), Psychiatry, & Talkspace Self-Guided



# of Employees	Premium Bundle - Annual Fee
130	\$65,000 (\$5,416.66/month) \$55,000 (\$4,583.33/month)

Talkspace Standard Bundle

Our most popular mental health solution

Incl.: Therapy (unlimited messaging +1 live session/mo.) + Psychiatry **OR** Talkspace Self-Guided



# of Employees	Standard Bundle - Annual Fee
130	\$55,000 (\$4,583.33/month) \$40,000 (\$3,333.33/month)

Individual Services

Therapy: (pick one messaging + plan of 2)

Unlimited Messaging

+ 1 Live Session per month

# of Employees	Annual Fee
130	\$40,000 (\$3,333.33/month)

Unlimited Messaging

+ 2 Live Sessions per month

# of Employees	Annual Fee
130	\$45,000 (\$3,750.00/month)

Psychiatry

Consultation, Diagnosis,

Prescriptions, Med. Mgmt

# of Employees	Annual Fee
N/A	N/A

Talkspace: Self-Guided

55+ Progs. 800+ Sessions

2-4 Live Group Classes Weekly

# of Employees	Annual Fee
130	\$24,000

Optional Add-on - Dependents

* Includes spouses and dependents age 13 & older (18 & older for Psychiatry)

Dependent Access* w/ Any Bundle or Therapy	Additional Annual Fee
Unlimited	\$12,000 (\$1,000.00/month)

The pricing in this proposal is valid for 60 days from the date of this proposal

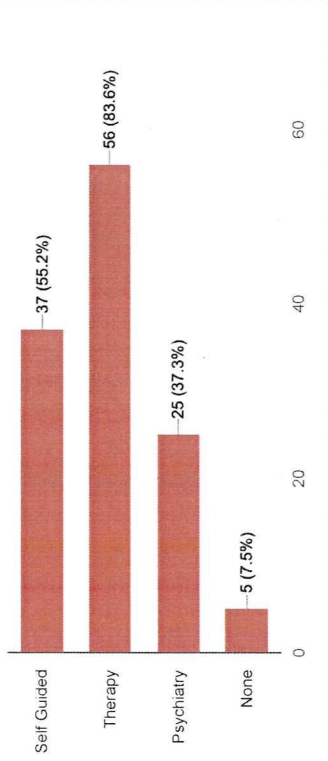
Mental Health Benefit/Services

67 responses

[Publish analytics](#)

What services would you be interested in your or your family using (select all that apply):

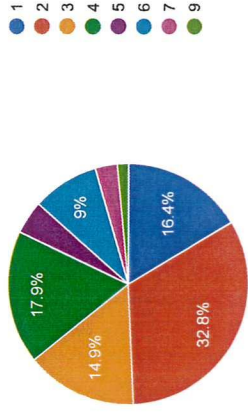
67 responses



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How many members of your family, including you and your spouse as well as dependents that are 13 or older?

67 responses



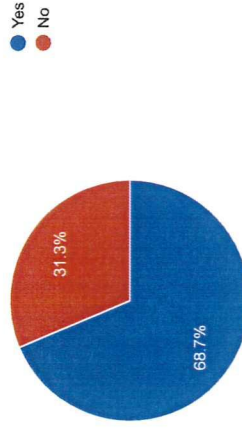
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As part of this program there will be optional classes that relate to mental health which include: Anxiety, Communication, Depressions, Burnout, Parenting, Relationship etc..

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Would you be likely to participate in an optional incentive program, much like the step challenges, around mental health and these classes throughout the year?

67 responses



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