

ADMINISTRATION

General Administration

The goal of the Administration Policy is to enable the Trustees for the Everett School Employee Benefit Trust (“Trustees”) to administer the Everett School Employee Benefit Trust (“Trust”) in accordance with the terms of the Trust document, benefit document(s), Title 48, Chapter 62 RCW, if the Trust self-insures any Trust benefits, District policies and procedures, and procedures adopted by the Trustees. The Trust is sponsored by the Everett School District (“District”) and the Everett Education Association (“Association”).

Responsibilities

The Trustee’s key administrative responsibilities are grouped by type of responsibility and are generally described below. The following is not intended to be a comprehensive listing of all responsibilities. From time to time, the Trustees shall review updates on typical administrative committee practices and may revise the following administrative responsibilities by Trustees action. The Trustees will develop appropriate procedures to address these responsibilities:

- Selection, appointment and monitoring any external third-party administrator, Trust fund investment advisor or manager, consultant or other advisor.
- Interpreting Trust document and benefit document terms.
- ~~Appoint claims administrator(s) to determine initial claims for benefits funded directly by the Trust, and decide all benefit claim~~Establish claims and appeals ~~in accordance with the claims procedures contained in the benefit documents specified in Appendix I of the Trust document~~procedures that comply with the Trust agreement and applicable law.
- Select insurance carriers for benefits funded through insurance purchased by the Trust. Such insurance carriers must be licensed or authorized by the State of Washington to transact insurance in the State of Washington.
- Providing benefit statements.
- Ensuring only appropriate expenses are paid with Trust funds.

The Trustees may adopt such additional rules and procedures as it deems desirable for the conduct of its affairs, managing and controlling the Trust and administration of the benefits funded by the Trust, provided that any such rules and procedures shall be consistent with the provisions of the Trust document, other District policies and procedures, RCW 48.62 and its implementing regulations, ~~and~~ if the Trust self-insures any Trust benefits, and other applicable law.

The Trustees will develop and adopt procedures for carrying out this policy.

Adopted: August 29, 2005

Revised: January 24, 2011

Revised: October 16, 2013

Revised: June 14, 2017

-

-

Document comparison by Workshare Professional on Thursday, May 04, 2017
2:39:17 PM

Input:	
Document 1 ID	interwovenSite://DMS/LEGAL/135456113/1
Description	#135456113v1<LEGAL> - Policy 100 - General Administration
Document 2 ID	C:\Users\ROGEN\My Documents\NRPortb\LEGAL\ROGEN\135456113_2.doc
Description	C:\Users\ROGEN\My Documents\NRPortb\LEGAL\ROGEN\135456113_2.doc
Rendering set	Perkins

Legend:	
<u>Insertion</u>	
Deletion	
Moved from	
<u>Moved to</u>	
Style change	
Format change	
Moved deletion	
Inserted cell	
Deleted cell	
Moved cell	
Split/Merged cell	
Padding cell	

Statistics:	
	Count
Insertions	7
Deletions	10
Moved from	0
Moved to	0
Style change	0
Format changed	0
Total changes	17