* **TRUSTEES**

Greg Elder, Evergreen Middle School Teacher

Larry Fleckenstein, Assistant Superintendent Teaching and Learning

Adam Goldstein, UniServ Director

Susan Lindsey, Jackson Elementary Teacher

Jeff Moore, Executive Director Finance and Business Services

Kelly Shepherd, Principal, Sequoia High School

* **STAFF**

Darla Van Duren, Trust Administrator – District Accountant

Kellee Newcomb, Trust Recorder – Executive Staff Assistant

Shelly Henderson – Wellness Coordinator

Debbie Kovacs –Executive Director Human Resources

Randi Seaberg –Director Human Resources

Gayla Jenner – Payroll Director

Cris Bosket – Benefits Technician

Angela Erickson – Benefits Technician

* **THIRD PARTY ADMINISTRATORS, CONSULTANTS AND ADVISORS**

Attorney

Perkins Coie – Melanie Curtice

Auditors

Toyer, Dietrich & Associates – Bruce Dietrich

Benefits Consultant

Mercer Health & Benefits – Sean White (Principal and Client Relationship Manager), Katy Rebar, and Nick Albert (Senior Actuarial Analyst)

Insurance

Fiduciary Liability Insurance – Marsh U.S. Consumer underwritten by Chubb Group

* **FINANCIAL MANAGEMENT**

Bank – Investments

US Bank

Bank – Checking

Union Bank

Investment Consultant

Hyas Group, Jayson Davidson

Investment Manager

Becker Capital Management, Inc.

* **BASIC BENEFITS**

Medical (includes prescription)

Aetna

Group Health Cooperative HMO (Health Maintenance Organization)

Coverage is available for all eligible employees with a benefit FTE of .333 and above, spouse and their dependents up to age 26.

Prescriptions included with above

Aetna RX

Dental

WEA—Washington Dental Service

WEA—Willamette Dental Plan

Vision

MetLife

Long Term Disability

MetLife

Life Insurance

MetLife

Accidental Death and Dismemberment Plan

MetLife

Employee Assistance Program

Magellan Behavior

* **OPTIONAL BENEFITS—Paid by Employee**

Additional Optional Life Insurance

Voluntary Short Term Disability Insurance (Salary Insurance) – MetLife

Long Term Care Plan – Unum

* **BENEFITS MANAGED BY THE DISTRICT (not by the ESEBT)**

Flexible Spending Accounts (FSAs – Dependent Care & Health Care)

Tax Sheltered Annuity Plan

Health Savings Accounts (HSA)

* **EXTERNAL SUPPORT**

Tobacco cessation

Alere Wellbeing (Quit for Life program)

Weight management (Wellness Program)

Weight Watchers

* **INTERNAL SUPPORT**

Wellness Program: Health risk assessment, lifestyle coaching & web portal administration—Shelly Henderson – Wellness Coordinator

* **TRUST FINANCES**

The Trust’s fiscal year = July 1 to June 30

Cash Flow into the Trust:

* The state pays an allocation to the district of approximately $780 per month per FTE (per S275) for health care, and the district provides this entire amount to the Trust each month. In addition, the district provides the Trust with $780 per FTE for all employees the state does not include in their calculations. The district also pays for those employees with less than .333 FTE and employees that do not elect to have health benefits through the Trust. The net result is the district pays the Trust approximately $780 (prorated) per FTE for all employees of the district.
* The district provides the entire amount ($780 per month per FTE) to the Trust each month.
* Employees pay (through payroll deductions) approved amounts into the Trust each month for plan and options chosen. Generally, employer contributions for Group Health and WEA plans are more than the actual costs, and employee contributions are less than the actual costs for the plans.
* **OTHER**
* The district pays the retiree subsidy (“carve out”) required by the state directly to the Health Care Authority ($65.25 per month per FTE) each month. These funds do not flow through the Trust.