

# Everett School Employee Benefit Trust

## 2012-13 Overview

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### ➤ **TRUSTEES**

Michael Gunn – Executive Director Facilities & Planning  
David Jones – Cedar Wood Elementary Principal  
Susan Lindsey, Chairperson – Jackson Elementary Teacher  
John Morrill – Pilchuck Uniserv Council  
Molly Ringo – Secretary – Assistant Superintendent K-12 Education, Central Region  
Jennifer Green – Cascade High School Teacher

### ➤ **STAFF**

Darla Van Duren, Trust Administrator – District Accountant  
Kellee Newcomb, Trust Recorder – Executive Staff Assistant  
Lynn Evans – Executive Director Human Resources  
Randi Seaberg – Director Human Resources  
Beverly Rogers – Payroll Manager  
Vickie Loyola – Payroll Technician  
Arlene Vollema-Rich – Benefits Technician  
Rene Boswell – Benefits Technician  
Gail Buquicchio – Wellness Coordinator

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

#### Attorney

Stoel Rives – Melanie Curtice, Howard Bye

#### Auditors

Toyer, Dietrich & Associates – Bruce Dietrich

#### Benefits Consultant

Mercer Human Resources Consulting – Sean White (Principal and Client Relationship Manager), Aanya Lee (Associate Consultant), and Liz Abersold (Financial Analyst)

#### Insurance

Stop Loss Insurance – SunLife  
Fiduciary Insurance – Chubb Group

### ➤ **FINANCIAL MANAGEMENT**

#### Bank

Union Bank of California

#### Investment Consultant

Hyas Group, Jayson Davidson

#### Investment Manager

Becker and Associates

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### ➤ **BASIC BENEFITS**

#### Medical (includes prescription and vision)

Premiera Blue Cross (WEA Plans)

Group Health Cooperative HMO (Health Maintenance Organization)

Vision coverage is available for all eligible employees with a benefit FTE of .330 and above, spouse and their dependents up to age 26.

#### Prescriptions included with above

Medco (mail order)

#### Dental

Washington Dental Service

Willamette Dental Plan

#### Long Term Disability

Standard Insurance Company

#### Life Insurance

MetLife

#### Accidental Death and Dismemberment Plan

MetLife

#### Employee Assistance Program

Magellan Health Services

### ➤ **OPTIONAL BENEFITS—Paid by Employee**

Additional Optional Life Insurance

Add medical/dental coverage for spouse/partner/family

Voluntary Short Term Disability Insurance (Salary Insurance) – Standard Insurance Co.

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

US Savings Bonds

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### ➤ **EXTERNAL SUPPORT**

#### Tobacco cessation

Free & Clear

#### Weight management (Wellness Program)

Mind & Body Program

Weight Watchers

#### Home visits

Carena Urgent Care

### ➤ **INTERNAL SUPPORT**

Wellness Program: Health risk assessment, lifestyle coaching & web portal administration—

Gail Buquicchio – Wellness Coordinator

Health/Force & Wellsource Health Solutions

### ➤ **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 \$768 (2012-13) 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 \$768 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 \$768 per FTE for all employees of the district.
- The district provides the entire amount (\$768 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, employee 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 (\$65.17 per month per FTE) each month. These funds do not flow through the Trust.