

# GLENDALE ELEMENTARY SCHOOL DISTRICT NO. 40

Trust Board Regular Meeting  
September 22, 2021 4:00 p.m.

## **Public Notice – Meeting Agenda**

Notice of this meeting has been posted consistent with the requirements of A.R.S. §38-431.02. The meeting's location is the East Board Room in the District Office, 7301 N. 58<sup>th</sup> Avenue. Glendale, AZ 85301.

The Board reserves the right to change the order of items on the agenda, with the exception of public hearings, which are scheduled for a specific time. Board members may participate via telephone conference call, if necessary. At the chair's discretion, the Board may carry over consideration of any business not concluded by 6:00 p.m. to the next regular meeting's agenda.

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### **1. Call to Order and Roll Call**

### **2. Opening Exercises**

- a. Adoption of Agenda
- b. Board and Staff Introductions
- c. Pledge of Allegiance

### **3. Call to the Public**

The public is invited to address the Board on any issue within its jurisdiction, subject to reasonable time, place and manner restrictions. Trust Board members are not permitted to discuss or take legal action on matters raised during open call to the public unless the matters are properly noticed for discussion and legal action. However, the law permits Trust Board members to do the following at the conclusion of the open call to the public: (a) Respond to criticism made by those who have addressed the Board; (b) Ask staff to review a matter; or (c) Ask that a matter be put on a future agenda.

Those wishing to address the Trust Board should complete a "Call to the Public" form and submit it to the Trust Board Secretary prior to the start of the meeting. Each speaker will be provided three (3) minutes to address the Trust Board, unless provided other direction by the Board. At the outset of the speaker's remarks, the speaker should state their name and the Trust Board requests that the speaker provide his/her address.

### **4. Action Items**

#### **a. Approval of Minutes**

It is recommended the Trust Board approve the minutes of the June 16, 2021 regular meeting as presented.

### **5. Reports and Informational Items**

#### **a. Assistant Superintendent's Update**

Administration will present the Trust Board with an update on GESD's business operations.

#### **b. Cybersecurity Presentation**

Arizona School Risk Retention (TRUST) will present the Trust Board an overview of GESD's cybersecurity coverage.

#### **c. Claims Experience Review – Medical**

The Trust Board will review medical claims experience for July and August 2021.

d. Claims Experience Review – Dental

The Trust Board will review dental claims experience for July and August 2021.

e. Financial Review – Employee Benefits

The Trust Board will review employee benefits' financial statements for June 2021.

f. Claims Experience Review – Workers' Compensation

The Trust Board will review workers' compensation experience for August 2021.

g. Financial Review – Workers' Compensation

The Trust Board will review workers' compensation financial statements for June 2021.

h. Financial Review – COVID-19 Legal Defense

The Trust Board will review COVID-19 legal defense financial statements for June 2021.

i. Wellness/Insurance Update

Staff will present the Trust Board with updates on GESD's insurance and wellness programs.

**6. Summary of Current Events**

a. Trust Board Report

Trust Board Members will present brief summaries of current events, as necessary.

**7. Adjournment**

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD

**ACTION AGENDA ITEM**

AGENDA NO: 4.A. TOPIC: Approval of Minutes

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SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

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DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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RECOMMENDATION:

The minutes of the September 22, 2021 regular meeting are submitted for approval.

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RATIONALE:

The minutes of September 22, 2021 regular meeting are attached.

**MINUTES OF THE REGULAR TRUST BOARD MEETING**  
**Glendale Elementary School District No. 40 of Maricopa County, Arizona**  
**District Office, West Board Room 4:00 p.m.**  
**August 25, 2021**

Present: Board Members  
Mr. Lee Peterson  
Ms. Mary Ann Wilson  
Mrs. Teresa Wong  
Ms. Bernadette Bolognini

Other Attendees:  
Mr. Mike Barragan  
Ms. Jodi Finnesy  
Mrs. Valerie Caraveo  
Mrs. Courtney Pina  
Mrs. Cindy Segotta-Jones  
Mr. Clifford Vellucci  
Mrs. Judy Niblick  
Ms. Davita Solter *\*arrived at 4:13 p.m.*

Absent: None

Recorder: Mrs. Alejandra Lopez

**CALL TO ORDER**

Mr. Peterson called the meeting to order at 4:00 p.m. and noted the presence of the four (4) Trust Board members, constituting a quorum.

**APPROVAL OF AGENDA**

Ms. Wilson motioned to approve the agenda as presented; Ms. Bolognini seconded; upon a call to vote, the motion carried with four (4) votes in favor from Mrs. Wong, Ms. Wilson, Ms. Bolognini and Mr. Peterson.

**BOARD AND STAFF INTRODUCTIONS**

Mr. Peterson welcomed everyone in attendance.

Mr. Barragan welcomed Superintendent, Mrs. Segotta-Jones, and guests.

Mrs. Courtney Pina, Accounting/Budget Supervisor, Ms. Jodi Finnesy, Benefits Analyst, Mrs. Valerie Caraveo, Director of Finance and Purchasing, and Mrs. Judy Niblick, Human Resources Technician, introduced themselves.

**CALL TO THE PUBLIC**

Mr. Peterson read the call to the public.

**Approval of Minutes**

Ms. Wilson motioned to approve the June 16, 2021 minutes; Ms. Bolognini seconded; upon a call to vote, the motion carried with four (4) votes in favor from Mrs. Wong, Ms. Wilson, Ms. Bolognini and Mr. Peterson.

**Approval of the 2021-2022 Trust Board Meeting Schedule**

Ms. Bolognini motioned to approve the 2021-2022 Trust Board meeting schedule; Mrs. Wong seconded; upon a call to vote, the motion carried with four (4) votes in favor from Mrs. Wong, Ms. Wilson, Ms. Bolognini and Mr. Peterson.

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Anyone wishing to review copies of reports of detailed information provided to the Trust Board to substantiate recommendations might find this information available at the District Office. Persons with disabilities may request reasonable accommodations by contacting (623) 237-7110 at least two days prior to the meeting.

## **INFORMATIONAL ITEMS**

### **Assistant Superintendent's Update**

Mr. Barragan welcomed everyone back from summer break and thanked the Trust Board members for their service and leadership.

Mr. Barragan commended Mrs. Segotta-Jones, Superintendent, on her leadership during these unprecedented times.

Mr. Barragan gave a summary on the start of school. He mentioned issues with the HVAC units, and the current national bus driver shortage, which is being felt across the state and nation.

Mr. Barragan reported 770 students/staff were quarantined.

Mr. Barragan shared the September meeting agenda will include a cyber security presentation by the Arizona School Risk Retention Trust (the TRUST).

### **Risk Manager**

Mr. Barragan introduced Mr. Vellucci, who began his new role as risk manager on July 1, 2021.

Mr. Vellucci thanked the Trust Board, Mr. Barragan and Superintendent for the opportunity.

Mr. Vellucci shared he was Landmark's Assistant Principal and prior to his education background, he was in the Marines for 25 years.

Mr. Vellucci provided an update on Personal Protective Equipment (PPE) being distributed to sites. This school year a total of 11,000 student dividers were purchased and distributed to sites along with disinfectant spray/wipes, masks and hand sanitizer.

Mr. Peterson and Trust Board members welcomed Mr. Vellucci and thanked him for his service.

### **Claims Experience Review - Medical**

Mr. Barragan reported:

#### **Fiscal Year 2021**

In May, GESD incurred \$603,755 in medical claims, which represents a monthly loss ratio of 87%.

In June, GESD incurred \$444,912 in medical claims, which represents a monthly loss ratio of 68%.

There are 11 claims above \$75,000 and one (1) is above the \$200,000 stop loss level totaling \$1,445,707.61. This represents 21% of the total medical claims. The anticipated refund is \$133,864 from the claim(s) exceeding the stop loss level.

GESD generated \$8,290,313 in revenues and incurred medical claims of a \$6,809,094 or a loss ratio of 82% by June 30, 2021.

Mr. Peterson asked if there was more information on the medical claims that are above \$200,000.

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Mr. Barragan mentioned the Health Review presentation will be scheduled in October.

Mrs. Wong shared that about 40% of our medical prescriptions are for diabetic management and reports show a recent decrease of 2%.

**Financial Review – Employee Benefits**

Mr. Barragan reported:

The financial report for May 31, 2021, reflects the “Ending net position reserved for claims and expenses” as \$18,571,228.73.

**Claims Experience Review – Workers’ Compensation**

Mr. Barragan reported:

In July, GESD logged four (4) incidents and GESD incurred \$12,300 for the month.

GESD has 23 open claims recorded since 2013 and the “Paid” amount is \$2,824,949.42 compared to the “Incurred” of \$3,597,205.24.

GESD has six (6) claimants above \$75,000 (based on the “Paid” amount) and five (5) above \$150,000. For the purpose of workers’ compensation, the stop-loss-level is \$350,000.

The “Paid” amount for the six (6) claimants are \$2,534,874.35 or 90% of the total “Paid” amount of \$2,824,949.42 and \$3,015,597.61 or 84% of the total “Incurred” amount of \$3,597,205.24.

The average cost per individuals is:

- \$122,823.89 for “Paid”
- \$156,400.23 for “Incurred”

In June, GESD logged three (3) incidents and GESD incurred \$12,800 for the month.

GESD has 26 open claims recorded since 2013 and the “Paid” amount is \$2,753,988.68 compared to the “Incurred” of \$3,530,629.96.

GESD has six (6) claimants above \$75,000 (based on the “Paid” amount) and five (5) above \$150,000. For the purpose of workers’ compensation, the stop-loss-level is \$350,000.

The “Paid” amount for the six (6) claimants are \$2,530,388.35 or 92% of the total “Paid” amount of \$2,753,988.68 and \$3,015,597.61 or 85% of the total “Incurred” amount of \$3,530,629.96.

The average cost per individuals is:

- \$105,922.64 for “Paid”
- \$135,793.46 for “Incurred”

Mr. Barragan shared administration will provide a quarterly report to include the type of injuries and their recorded number.

**Financial Review – Workers’ Compensation**

Mr. Barragan reported:

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The financial report for May 31, 2021, reflects the “Ending net position reserved for claims and expenses” as \$2,338,788.64.

**Financial Review – COVID-19 Legal Defense**

Mr. Barragan reported:

The financial report for May 31, 2021, reflects the “Ending net position reserved for claims and expenses” as \$750,989.95.

Mrs. Wong asked if the District should consider increasing its reserves to address any potential litigation.

Mr. Barragan addressed Mrs. Wong question, by stating that it is being discussed in the business office. What is difficult is determining the appropriate amount.

Mr. Peterson pointed out the total non-operating revenue.

**Wellness and Insurance Benefit Update**

Mrs. Wong provided copies of the Benefit Enrollment booklet for fiscal year 21-22, which are being used for recruiting purposes and for staff.

Mrs. Wong pointed out the entire wellness/benefit team was present at today’s meeting.

Mrs. Wong shared the wellness/benefit team took a tour of the new Valleywise Comprehensive Health Center for a possible partnership. Dr. Laffitte and his team are also touring the health center to see how they can assist with the system of care that will be housed at Coyote Ridge.

Mrs. Wong stated the “Know Your Benefits” email campaign has started.

Mrs. Wong shared a total of 51 employees used Interface EAP with the top three reasons being anxiety, legal and stress.

Ms. Solter provided wellness updates: blood drive is scheduled for September 1<sup>st</sup>, fall break event, and met with the new teacher ambassadors from all sites for lunch.

Mrs. Wong mentioned the biometric screening and flu shot clinic will be in October.

**Summary of Current Events**

Mrs. Wilson expressed how pleasant it is to have audience members present.

Mrs. Wong spoke about attending the AASBO summer annual conference in Tucson, AZ and how Mr. Barragan was a candidate for ASBO International.

**ADJOURNMENT**

Ms. Bolognini motioned to adjourn, Mrs. Wong seconded; upon a call to vote, the motion carried with four (4) votes in favor from Ms. Wilson, Mrs. Wong, Ms. Bolognini and Mr. Peterson.

There being no further business, the meeting adjourned at 4:49 pm.

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.A. TOPIC: Assistant Superintendent's Update

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The Administration will present the Trust Board with an update on the District's business operations.



GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.B. TOPIC: Cybersecurity Presentation

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The Arizona School Risk Retention (TRUST) will present the Trust Board an overview of GESD's cybersecurity coverage.

# TRUST CYBERSECURITY PROGRAM

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Ryan Cole, associate executive director

September 22, 2021



# The Cybersecurity 202: Schools are another prime ransomware target



By Joseph Marks

Anchor of The Cybersecurity 202 newsletter

July 12, 2021 at 7:19 a.m. EDT



with Aaron Schaffer

K-12 schools are getting hit with a barrage of ransomware attacks, worsening the damage to children's education brought on by the pandemic and hurting their ability to return to some semblance of normalcy in the fall.

It's part of a [surge in attacks](#) by hackers demanding ransom payments that has halted operations at critical industries across the nation and become a [key national security concern](#) for the Biden administration.

**Schools are facing these attacks with [poorer cyber defenses](#) than many private companies and with far more vulnerabilities that hackers could exploit.** That's especially true for schools that will still be operating at least partly remotely in the fall because every remote student's laptop is an entry point for hackers to worm their way in and infect an entire school's computer networks.

"All those students and teachers on their computers just dramatically opens up the attack surface," Josh Moulin, an executive at the Center for Internet Security, or CIS, told me, using an industry term for the number of computers hackers can target to break into an organization.

**PRATT INDUSTRIES**

IF YOU CAN  
**TEAR IT**  
**WE'LL TAKE IT**

BUY 100% RECYCLED BOXES

# Cyber Market

- Cyber claims on the rise
- Insurers are:
  - raising rates;
  - reducing limits; and
  - reducing coverage.



# Cyber Market: Claims Activity

- Ransomware
- Phishing
- Cybersecurity incidents are increasing in sophistication and frequency
- Average total incurred: \$15,000



# Trust Cyber Liability Coverage

- Coverage provided since 2013
- Basic cyber coverage (offered at no charge)
- Enhanced cyber coverage (offered at additional charge)



# Trust Cyber Liability Coverage

- \$5 million/occurrence
- \$5 million/annual aggregate per member
- \$15 million/annual aggregate shared with members (only those in the enhanced coverage program)
- \$5,000 deductible
- \$61,164: 2021/2022 contribution



# Cybersecurity Goals

- Continue offering cyber coverage
- Minimize cyber liability coverage rate increases
- Help members be proactive





# New Deductible Structure

- Deadline: July 1, 2022
- Two requirements:
  - Bi-annual phishing awareness campaign
  - Proof of an air-gap backup system
- \$5,000 deductible for compliant districts
- \$50,000 deductible for non-compliant districts



# How Do We Comply?

- Bi-annual phishing awareness campaign
- Proof of an air-gap backup system
- Provide documents to:
  - Your member services coordinator
  - Trust cybersecurity unit ([cyber@the-trust.org](mailto:cyber@the-trust.org))



## EXHIBIT 1: AIR GAP PROTECTION AUDIT QUESTIONNAIRE

Question	Yes	No	Comments
Are your district's backups password-protected and encrypted?			
How often are your district's systems backed up?	N/A	N/A	
Does your backup process follow the 3-2-1 methodology (3 copies of data, on 2 different media, with 1 copy being offsite and physically/logically disconnected from your network)?			
Do you have backups that are physically disconnected from the network?			
If you responded "no" to the previous question, are your backups logically removed from the network by turning down a port or turning off the device?			
Are your backup credentials separate from domain credentials?			
If your domain administrator account was compromised, would your backup be accessible with those credentials?			
Are your backups immutable, in that they cannot be changed or deleted without strict authentication (MFA or other)?			
Do you validate the integrity of your backups? If so, how often?			
Do you have a backup system or backup process that protects against ransomware and that is not contemplated in the questions above? If so, please describe the process.			
Please provide the names of vendors used for your backups.	N/A	N/A	



# Future Deductible Structure?

- Will be based on demands from Trust reinsurers
- Multi-factor authentication
- Vulnerability scanning



# Trust Cybersecurity Services

For more information, contact your Trust member services coordinator or go to [the-trust.org](https://the-trust.org)

Service	Description	Intended Audience	Time
<b>1</b> Cyber Risk Assessment	The Cybersecurity Risk Assessment process is the initial step in helping districts understand threats to and vulnerabilities of their information systems. This service begins with a risk assessment survey and provides a prioritized list of risks.	IT Managers, Business Managers, and Risk Managers	2 hours
<b>2</b> Cybersecurity Incident Response Planning	Members using this service can take advantage of a structured approach to creating an Incident Response Plan. Also offered are tabletop exercises designed to train and assist members in working through a possible incident scenario.	IT Managers, Business Managers, Risk Managers, and Emergency Managers	Self-Paced
<b>3</b> Virtual Chief Information Security Officer (vCISO) Services	Districts can engage with a subject matter expert on cybersecurity topics such as: <ul style="list-style-type: none"> <li>• network architecture,</li> <li>• access control, and</li> <li>• encryption.</li> </ul>	IT Managers, Business Managers, and Risk Managers	As needed
<b>4</b> Cyber Education and Awareness	The Cyber Education and Awareness series includes training on: <ul style="list-style-type: none"> <li>• general user cybersecurity awareness,</li> <li>• phishing campaigns and education (NEW!), and</li> <li>• disaster recovery.</li> </ul>	IT Managers, Business Managers, Risk Managers, and District Staff	As needed
<b>5</b> IT Policy Templates	Organizations can download and customize policies from the Trust website.	IT Managers and Business Managers	Self-Paced
<b>6</b> Vulnerability Assessments	An external vulnerability scan will be conducted and a report of any identified vulnerabilities and remediation guidance will be provided.	IT Managers	2 hours

The service order given above is suggested for districts that are beginning a cyber security initiative. The recommended order of services may vary, however, based on each district's cyber posture and need.

Technical terms are defined on the reverse side of this document.



# Contact Info

Ryan Cole

[rcole@the-trust.org](mailto:rcole@the-trust.org)

(602) 200-2421



GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.C. TOPIC: Claims Experience Review - Medical

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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In July, GESD incurred \$1,013,550 in medical claims, which represents a monthly loss ratio of 167%.

In August, GESD incurred \$587,360 in medical claims, which represents a monthly loss ratio of 97%.

There are three (3) claims above \$75,000 and 0 is above the \$200,000 stop loss level totaling \$434,468. This represents 27% of the total medical claims. The anticipated refund is \$0 from the claim(s) exceeding the stop loss level.

Based on the trend, we project revenues to generate \$7,290,444 by June 30, 2022 and we anticipate to incur medical claims of approximately \$9,605,460 or a loss ratio of 132% by June 30, 2022.



# Monthly Experience Report

Glendale EI-All

Dates: (7/1/2021-6/30/2022)

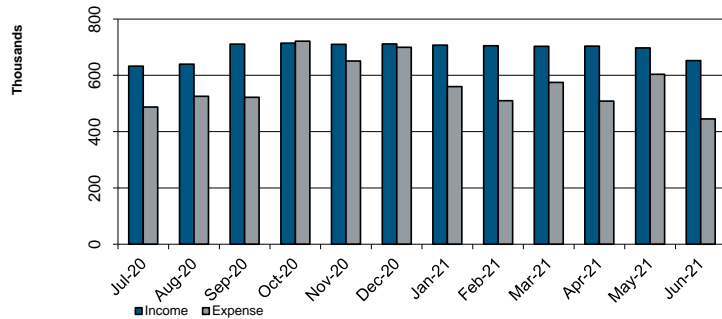


Name: Valley Schools Employee Benefits Group

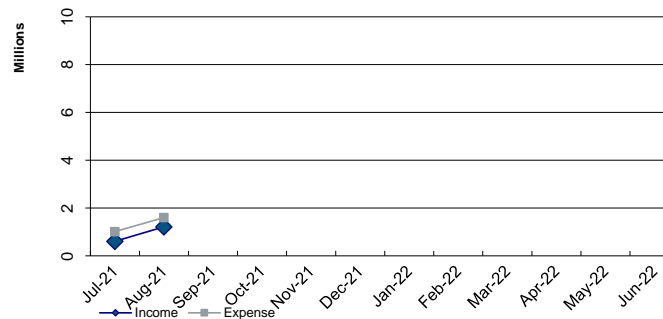
Plan: All

a Date	b Employees	c Members	d Paid Medical Claims	e Less Estimated Specific Stop Loss Refunds	f Paid RX Claims	g Total Net Medical/RX Claims	h PEPM Fixed Expenses	i Total Paid Claims & Expenses	j Total Calculated Premium Equivalent	k Surplus/ (Deficit)	l Total Cost Loss Ratio	m Total Cost PMPM	n Prior Year YTD Loss Ratio
2021-07	869	1,272	\$ 838,817	\$ -	\$ 113,903	\$ 952,720	\$ 60,830	\$ 1,013,550	\$ 606,576	\$ (406,974)	167%	\$ 797	77%
2021-08	871	1,272	\$ 411,951	\$ -	\$ 114,439	\$ 526,390	\$ 60,970	\$ 587,360	\$ 608,499	\$ 21,139	97%	\$ 462	79%
2021-09	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	77%
2021-10	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	84%
2021-11	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	85%
2021-12	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	88%
2022-01	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	86%
2022-02	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	85%
2022-03	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	84%
2022-04	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	83%
2022-05	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	83%
2022-06	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	82%
<b>Total</b>	<b>1,740</b>	<b>2,544</b>	<b>\$ 1,250,768</b>	<b>\$ -</b>	<b>\$ 228,343</b>	<b>\$ 1,479,110</b>	<b>\$ 121,800</b>	<b>\$ 1,600,910</b>	<b>\$ 1,215,075</b>	<b>\$ (385,836)</b>	<b>132%</b>	<b>\$ 629</b>	
<b>Mo. Avg.</b>	<b>870</b>	<b>1,272</b>	<b>\$ 625,384</b>	<b>\$ -</b>	<b>\$ 114,171</b>	<b>\$ 739,555</b>	<b>\$ 60,900</b>	<b>\$ 800,455</b>	<b>\$ 607,537</b>	<b>\$ (192,918)</b>		<b>\$ 629</b>	
PY Mo. Avg. @ 6/30/21	1,000	1,455	\$ 411,669	\$ 11,266	\$ 97,016	\$ 497,419	\$ 70,006	\$ 567,424	\$ 690,859	\$ 123,435		\$ 390	

HISTORICAL MONTHLY INCOME VS EXPENSE



CURRENT PLAN YR CUMULATIVE INCOME VS EXPENSE







# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: All Active

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PMPM
2021-07	846	1,242	\$ 836,280	\$ -	\$ 111,090	\$ 947,371	\$ 59,220	\$ 1,006,591	\$ 590,269	\$ (416,322)	171%	\$ 810
2021-08	849	1,243	\$ 404,257	\$ -	\$ 112,318	\$ 516,575	\$ 59,430	\$ 576,005	\$ 592,788	\$ 16,783	97%	\$ 463
2021-09	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-10	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-11	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-12	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-01	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-02	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-03	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-04	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-05	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-06	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
<b>Total</b>	1,695	2,485	\$ 1,240,537	\$ -	\$ 223,409	\$ 1,463,946	\$ 118,650	\$ 1,582,596	\$ 1,183,056	\$ (399,540)	134%	\$ 637
<b>Mo. Avg.</b>	848	1,243	\$ 620,269	\$ -	\$ 111,704	\$ 731,973	\$ 59,325	\$ 791,298	\$ 591,528	\$ (199,770)		\$ 637



# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: All COBRA

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PMPM
2021-07	23	30	\$ 2,536	\$ -	\$ 2,813	\$ 5,349	\$ 1,610	\$ 6,959	\$ 16,307	\$ 9,348	43%	\$ 232
2021-08	22	29	\$ 7,694	\$ -	\$ 2,121	\$ 9,815	\$ 1,540	\$ 11,355	\$ 15,711	\$ 4,356	72%	\$ 392
2021-09	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-10	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-11	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2021-12	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-01	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-02	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-03	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-04	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-05	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
2022-06	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
<b>Total</b>	45	59	\$ 10,230	\$ -	\$ 4,934	\$ 15,164	\$ 3,150	\$ 18,314	\$ 32,018	\$ 13,704	57%	\$ 310
<b>Mo. Avg.</b>	23	30	\$ 5,115	\$ -	\$ 2,467	\$ 7,582	\$ 1,575	\$ 9,157	\$ 16,009	\$ 6,852		\$ 310



# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: Traditional-Active

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost MPPM
2021-07	426	616	\$ 353,643	\$ -	\$ 94,216	\$ 447,859	\$ 29,820	\$ 477,679	\$ 314,354	\$ (163,326)	152%	\$ 775
2021-08	429	621	\$ 226,417	\$ -	\$ 97,882	\$ 324,299	\$ 30,030	\$ 354,329	\$ 317,382	\$ (36,947)	112%	\$ 571
2021-09						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-10						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-11						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-12						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-01						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-02						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-03						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-04						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-05						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-06						\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total</b>	855	1,237	\$ 580,059	\$ -	\$ 192,099	\$ 772,158	\$ 59,850	\$ 832,008	\$ 631,736	\$ (200,273)	132%	\$ 673
<b>Mo. Avg.</b>	428	619	\$ 290,030	\$ -	\$ 96,049	\$ 386,079	\$ 29,925	\$ 416,004	\$ 315,868	\$ (100,136)	132%	\$ 673

### Monthly Contribution Rates

Premiums	
Employee Only	\$ 584.35
Employee + Spouse	\$ 1,221.97
Employee + Child(ren)	\$ 1,126.40
Employee + Family	\$ 1,556.52



# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: Traditional-COBRA

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PMPM
2021-07	19	26	\$ 2,536	\$ -	\$ 2,806	\$ 5,342	\$ 1,330	\$ 6,672	\$ 14,170	\$ 7,498	47%	\$ 257
2021-08	18	25	\$ 7,185	\$ -	\$ 2,121	\$ 9,306	\$ 1,260	\$ 10,566	\$ 13,574	\$ 3,007	78%	\$ 423
2021-09						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-10						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-11						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-12						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-01						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-02						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-03						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-04						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-05						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-06						\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total</b>	37	51	\$ 9,722	\$ -	\$ 4,927	\$ 14,649	\$ 2,590	\$ 17,239	\$ 27,744	\$ 10,505	62%	\$ 338
<b>Mo. Avg.</b>	19	26	\$ 4,861	\$ -	\$ 2,464	\$ 7,324	\$ 1,295	\$ 8,619	\$ 13,872	\$ 5,253	62%	\$ 338

### Monthly Contribution Rates

Premiums	
Employee Only	\$ 596.04
Employee + Spouse	\$ 1,246.41
Employee + Child(ren)	\$ 1,148.93
Employee + Family	\$ 1,587.65



# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: HDHP-Active

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PMPM
2021-07	420	626	\$ 482,638	\$ -	\$ 16,874	\$ 499,512	\$ 29,400	\$ 528,912	\$ 275,915	\$ (252,997)	192%	\$ 845
2021-08	420	622	\$ 177,840	\$ -	\$ 14,436	\$ 192,276	\$ 29,400	\$ 221,676	\$ 275,406	\$ 53,730	80%	\$ 356
2021-09						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-10						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-11						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-12						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-01						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-02						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-03						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-04						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-05						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-06						\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total</b>	840	1,248	\$ 660,478	\$ -	\$ 31,310	\$ 691,788	\$ 58,800	\$ 750,588	\$ 551,321	\$ (199,267)	136%	\$ 601
<b>Mo. Avg.</b>	420	624	\$ 330,239	\$ -	\$ 15,655	\$ 345,894	\$ 29,400	\$ 375,294	\$ 275,660	\$ (99,633)	136%	\$ 601

### Monthly Contribution Rates

Premiums	
Employee Only	\$ 523.85
Employee + Spouse	\$ 1,032.72
Employee + Child(ren)	\$ 954.34
Employee + Family	\$ 1,307.05



# Monthly Experience Report

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)

Name: Valley Schools Employee Benefits Group

Plan: HDHP-COBRA

a	b	c	d	e	f	g	h	i	j	k	l	m
Date	Employees	Members	Paid Medical Claims	Less Estimated Specific Stop Loss Refunds	Paid RX Claims	Total Net Medical/RX Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Total Calculated Premium Equivalent	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PMPM
2021-07	4	4	\$ -	\$ -	\$ 7	\$ 7	\$ 280	\$ 287	\$ 2,137	\$ 1,850	13%	\$ 72
2021-08	4	4	\$ 509	\$ -	\$ -	\$ 509	\$ 280	\$ 789	\$ 2,137	\$ 1,348	37%	\$ 197
2021-09						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-10						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-11						\$ -	\$ -	\$ -	\$ -	\$ -		
2021-12						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-01						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-02						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-03						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-04						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-05						\$ -	\$ -	\$ -	\$ -	\$ -		
2022-06						\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total</b>	<b>8</b>	<b>8</b>	<b>\$ 509</b>	<b>\$ -</b>	<b>\$ 7</b>	<b>\$ 516</b>	<b>\$ 560</b>	<b>\$ 1,076</b>	<b>\$ 4,275</b>	<b>\$ 3,199</b>	<b>25%</b>	<b>\$ 134</b>
<b>Mo. Avg.</b>	<b>4</b>	<b>4</b>	<b>\$ 254</b>	<b>\$ -</b>	<b>\$ 4</b>	<b>\$ 258</b>	<b>\$ 280</b>	<b>\$ 538</b>	<b>\$ 2,137</b>	<b>\$ 1,599</b>	<b>25%</b>	<b>\$ 134</b>

### Monthly Contribution Rates

Premiums	
Employee Only	\$ 534.33
Employee + Spouse	\$ 1,053.37
Employee + Child(ren)	\$ 973.43
Employee + Family	\$ 1,333.19



## Enrollment Detail

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: Traditional

Date	Active				Total	Cobra				Total	Medical Plan Totals
	EE	SP	CH	FAM		EE	SP	CH	FAM		
2021-07	324	25	59	18	426	15	2	1	1	19	445
2021-08	325	27	59	18	429	14	2	1	1	18	447
2021-09	0	0	0	0	0	0	0	0	0	0	0
2021-10	0	0	0	0	0	0	0	0	0	0	0
2021-11	0	0	0	0	0	0	0	0	0	0	0
2021-12	0	0	0	0	0	0	0	0	0	0	0
2022-01	0	0	0	0	0	0	0	0	0	0	0
2022-02	0	0	0	0	0	0	0	0	0	0	0
2022-03	0	0	0	0	0	0	0	0	0	0	0
2022-04	0	0	0	0	0	0	0	0	0	0	0
2022-05	0	0	0	0	0	0	0	0	0	0	0
2022-06	0	0	0	0	0	0	0	0	0	0	0



## Enrollment Detail

Glendale Elementary School District

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: HDHP Base

Date	Active				Total	Cobra				Total	Medical Plan Totals
	EE	SP	CH	FAM		EE	SP	CH	FAM		
2021-07	311	20	68	21	420	4	0	0	0	4	424
2021-08	312	19	68	21	420	4	0	0	0	4	424
2021-09	0	0	0	0	0	0	0	0	0	0	0
2021-10	0	0	0	0	0	0	0	0	0	0	0
2021-11	0	0	0	0	0	0	0	0	0	0	0
2021-12	0	0	0	0	0	0	0	0	0	0	0
2022-01	0	0	0	0	0	0	0	0	0	0	0
2022-02	0	0	0	0	0	0	0	0	0	0	0
2022-03	0	0	0	0	0	0	0	0	0	0	0
2022-04	0	0	0	0	0	0	0	0	0	0	0
2022-05	0	0	0	0	0	0	0	0	0	0	0
2022-06	0	0	0	0	0	0	0	0	0	0	0





## REPORT DEFINITIONS

Column Name	Data Description
Date	Month and year for experience data reported.
Employees	Number of employees as reported by provider source.
Members	Number of members as reported by provider source.
Paid Medical Claims	Paid medical claims as reported by provider source in reported month for all claims paid since the effective date including current report month except as noted.
Less Estimated Specific Stop Loss Refunds	Estimated specific stop loss refunds. This amount includes estimated refunds for individual claims in excess of the stop loss deductible. Actual reimbursements are credited to the District's account after June 30th of the plan year. Amounts are estimates and may change during the adjudication process by the stop loss carrier.
Paid Rx Claims	Paid prescription drug claims as reported by provider source in reported month for all claims paid since the effective date including current report month.
Total Net Medical/Rx Claims	Net paid medical claims plus paid Rx claims less estimated stop loss refunds.
PEPM Fixed Expenses	This amount includes all administrative, third party administrators, stop loss coverage, and other services provided through Valley Schools.
Total Paid Claims & Expenses	Estimated paid claims plus plan fixed expenses.
Total Calculated Premium Equivalent	Contributions calculation = employees reported by provider source during reported month times contribution rates. Prior months totals may change based on any retroactivity reported by Districts.
Surplus/(Deficit)	Total contributions less total paid claims and expenses.
Total Cost Loss Ratio	Total paid claims and expenses divided by total contributions.
Total Cost PMPM	Total paid claims and expenses divided by total members.
Prior Year YTD Loss Ratio	Loss ratio year-to-date as of the same month in the prior year.

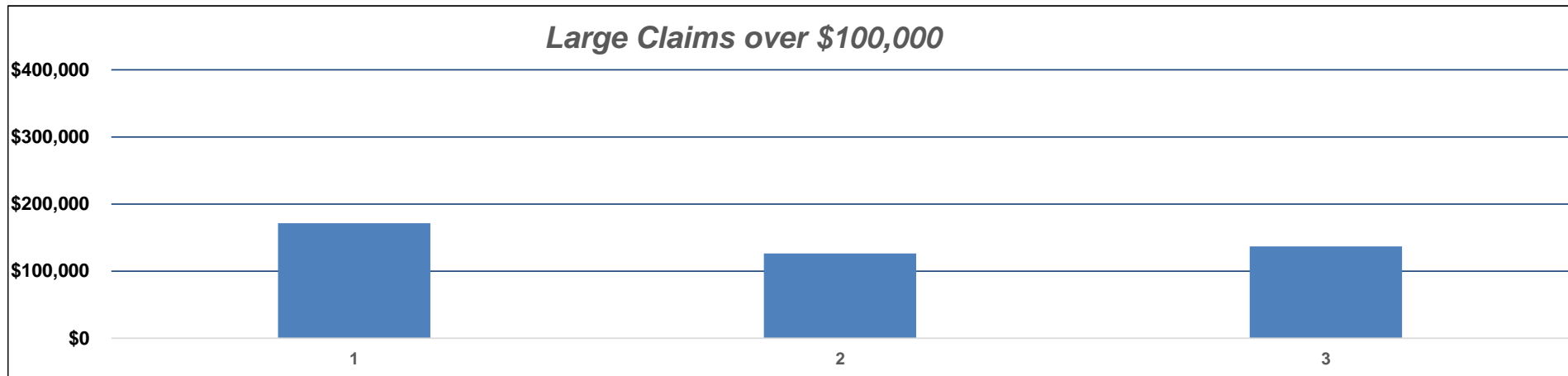
This data has not been audited and is presented for the sole purpose of measuring the plan performance. The accuracy and reliability of the Monthly Experience Report is dependent on the information available at the time the report was prepared. Any changes to the underlying data will affect the results reported in the Monthly Experience Report. This report will reflect any eligibility retroactively and this may lead to a restatement of prior month(s) data.



**Glendale Elementary School District  
Paid Claims Greater Than \$100,000 by Claimant  
Large Claims by Plan  
(7/1/2021 through 6/30/2022)**



# of claims > \$100K	
FY21	FY22
7	3



Claimant	Amount	SL Level	SL Level Remaining	Expected Refunds
1	\$171,273	\$200,000	\$28,727	\$0
2	\$126,315	\$200,000	\$73,685	\$0
3	\$136,880	\$200,000	\$63,120	\$0
<b>Total</b>	<b>\$434,468</b>			<b>\$0</b>



**Glendale Elementary School District**  
**Paid Claims Greater Than \$100,000 by Claimant**  
**Monthly Financial Reporting**  
**(7/1/2021 through 6/30/2022)**



Date	Plan Name		Paid Amount
2021-07	Traditional PPO		\$170,835.74
2021-08	Traditional PPO		\$437.35
		<b>Total for Claimant 1</b>	<b>\$171,273.09</b>
2021-07	HDHP		\$125,580.07
2021-08	HDHP		\$734.78
		<b>Total for Claimant 2</b>	<b>\$126,314.85</b>
2021-07	HDHP		\$124,963.18
2021-08	HDHP		\$11,916.50
		<b>Total for Claimant 3</b>	<b>\$136,879.68</b>
<b>TOTAL</b>		<b>Total</b>	<b>\$434,467.62</b>

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.D. TOPIC: Claims Experience Review - Dental

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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In August Pool I (or base plan) incurred \$167,438 in dental claims or a monthly loss ratio of 107%.

Based on the trend, we project revenues to generate \$1,844,436 by June 30, 2022 and we anticipate Pool I (or base plan) to incur approximately \$1,771,044 or a loss ratio of 96% by June 30, 2022.

In August, Pool III (or buy-up plan) incurred \$471,037 in dental claims or a monthly loss ratio of 123%.

Based on the trend, we project revenues to generate \$4,517,964 by June 30, 2021 and we anticipate Pool III (or base plan) to incur approximately \$4797,996 or a loss ratio of 106% by June 30, 2022.

In July, Pool I (or base plan) incurred \$127,735 in dental claims or a monthly loss ratio of 84%.

In July, Pool III (or buy-up plan) incurred \$328,628 in dental claims or a monthly loss ratio of 88%.

# Monthly Experience Report

VSEBG Master

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: Master

a	b	c	d	e	f	g	h	i	j
Date	Employees	Paid Dental Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Contributions	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PEPM	PY YTD Loss Ratio
2021-07	16,216	\$ 805,311	\$ 55,968	\$ 861,279	\$ 865,940	\$ 4,661	99%	\$ 53	111%
2021-08	16,673	\$ 1,033,435	\$ 57,370	\$ 1,090,805	\$ 886,442	\$ (204,363)	123%	\$ 65	100%
2021-09	-	\$ -	\$ -	\$ -	\$ -	\$ -			92%
2021-10	-	\$ -	\$ -	\$ -	\$ -	\$ -			85%
2021-11	-	\$ -	\$ -	\$ -	\$ -	\$ -			82%
2021-12	-	\$ -	\$ -	\$ -	\$ -	\$ -			82%
2022-01	-	\$ -	\$ -	\$ -	\$ -	\$ -			81%
2022-02	-	\$ -	\$ -	\$ -	\$ -	\$ -			81%
2022-03	-	\$ -	\$ -	\$ -	\$ -	\$ -			79%
2022-04	-	\$ -	\$ -	\$ -	\$ -	\$ -			82%
2022-05	-	\$ -	\$ -	\$ -	\$ -	\$ -			81%
2022-06	-	\$ -	\$ -	\$ -	\$ -	\$ -			83%
<b>Total</b>	32,889	\$ 1,838,746	\$ 113,338	\$ 1,952,084	\$ 1,752,382	\$ (199,702)	111%	\$ 59	
<b>Mo. Avg.</b>	16,445	\$ 919,373	\$ 56,669	\$ 976,042	\$ 876,191	\$ (99,851)		\$ 59	
PY Mo. Avg. @ 6/30/21	14,595	\$ 595,297	\$ 50,216	\$ 645,512	\$ 778,248	\$ 132,736		\$ 44	

# Monthly Experience Report

VSEBG Level I

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: Pool I

a	b	c	d	e	f	g	h	i	j
Date	Employees	Paid Dental Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Contributions	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PEPM	PY YTD Loss Ratio
2021-07	3,889	\$ 114,353	\$ 13,382	\$ 127,735	\$ 151,396	\$ 23,661	84%	\$ 33	73%
2021-08	4,045	\$ 153,519	\$ 13,919	\$ 167,438	\$ 156,010	\$ (11,428)	107%	\$ 41	74%
2021-09				\$ -	\$ -	\$ -			77%
2021-10				\$ -	\$ -	\$ -			66%
2021-11				\$ -	\$ -	\$ -			73%
2021-12				\$ -	\$ -	\$ -			75%
2022-01				\$ -	\$ -	\$ -			76%
2022-02				\$ -	\$ -	\$ -			77%
2022-03				\$ -	\$ -	\$ -			80%
2022-04				\$ -	\$ -	\$ -			79%
2022-05				\$ -	\$ -	\$ -			79%
2022-06				\$ -	\$ -	\$ -			81%
<b>Total</b>	7,934	\$ 267,872	\$ 27,301	\$ 295,173	\$ 307,406	\$ 12,233	96%	\$ 37	79%
<b>Mo. Avg.</b>	3,967	\$ 133,936	\$ 13,651	\$ 147,587	\$ 153,703	\$ 6,117		\$ 37	
PY Mo. Avg. @ 6/30/21	3,233	\$ 98,786	\$ 11,134	\$ 109,920	\$ 135,476	\$ 25,556		\$ 34	

### Monthly Contribution Rates

#### Pool Premiums

Employee Only	\$ 26.11
Employee + Spouse	\$ 52.22
Employee + Child(ren)	\$ 54.83
Employee + Family	\$ 78.32

#### City of Glendale & Cartwright Premiums

Employee Only	\$ 23.79
Employee + Spouse	\$ 49.96
Employee + Child(ren)	\$ 79.70
Employee + Family	\$ 79.70

# Monthly Experience Report

VSEBG Level II

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: Pool II

a	b	c	d	e	f	g	h	i	j
Date	Employees	Paid Dental Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Contributions	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PEPM	PY YTD Loss Ratio
2021-07	7,200	\$ 380,059	\$ 24,857	\$ 404,916	\$ 343,101	\$ (61,815)	118%	\$ 56	139%
2021-08	7,335	\$ 427,094	\$ 25,236	\$ 452,330	\$ 348,881	\$ (103,449)	130%	\$ 62	116%
2021-09				\$ -	\$ -	\$ -			105%
2021-10				\$ -	\$ -	\$ -			97%
2021-11				\$ -	\$ -	\$ -			90%
2021-12				\$ -	\$ -	\$ -			89%
2022-01				\$ -	\$ -	\$ -			88%
2022-02				\$ -	\$ -	\$ -			88%
2022-03				\$ -	\$ -	\$ -			87%
2022-04				\$ -	\$ -	\$ -			88%
2022-05				\$ -	\$ -	\$ -			86%
2022-06				\$ -	\$ -	\$ -			88%
<b>Total</b>	14,535	\$ 807,153	\$ 50,093	\$ 857,246	\$ 691,982	\$ (165,264)	124%	\$ 59	
<b>Mo. Avg.</b>	7,268	\$ 403,577	\$ 25,047	\$ 428,623	\$ 345,991	\$ (82,632)		\$ 59	
PY Mo. Avg. @ 6/30/21	6,701	\$ 248,796	\$ 23,058	\$ 271,854	\$ 308,100	\$ 36,247		\$ 41	

### Monthly Contribution Rates

#### Premiums

Employee Only	\$ 32.86
Employee + Spouse	\$ 65.72
Employee + Child(ren)	\$ 69.01
Employee + Family	\$ 98.58

# Monthly Experience Report

VSEBG Level III

Dates: (7/1/2021-6/30/2022)



Name: Valley Schools Employee Benefits Group

Plan: Pool III

a	b	c	d	e	f	g	h	i	j
Date	Employees	Paid Dental Claims	PEPM Fixed Expenses	Total Paid Claims & Expenses	Contributions	Surplus/ (Deficit)	Total Cost Loss Ratio	Total Cost PEPM	PY YTD Loss Ratio
2021-07	5,127	\$ 310,899	\$ 17,729	\$ 328,628	\$ 371,443	\$ 42,815	88%	\$ 64	102%
2021-08	5,293	\$ 452,822	\$ 18,215	\$ 471,037	\$ 381,551	\$ (89,486)	123%	\$ 89	97%
2021-09				\$ -	\$ -	\$ -			87%
2021-10				\$ -	\$ -	\$ -			81%
2021-11				\$ -	\$ -	\$ -			78%
2021-12				\$ -	\$ -	\$ -			78%
2022-01				\$ -	\$ -	\$ -			77%
2022-02				\$ -	\$ -	\$ -			77%
2022-03				\$ -	\$ -	\$ -			78%
2022-04				\$ -	\$ -	\$ -			78%
2022-05				\$ -	\$ -	\$ -			77%
2022-06				\$ -	\$ -	\$ -			79%
<b>Total</b>	10,420	\$ 763,721	\$ 35,944	\$ 799,665	\$ 752,994	\$ (46,671)	106%	\$ 77	
<b>Mo. Avg.</b>	5,210	\$ 381,861	\$ 17,972	\$ 399,833	\$ 376,497	\$ (23,336)		\$ 77	
PY Mo. Avg. @ 6/30/21	4,660	\$ 247,715	\$ 16,024	\$ 263,738	\$ 334,672	\$ 70,934		\$ 57	

### Monthly Contribution Rates

#### Premiums

Employee Only	\$ 45.01
Employee + 1	\$ 90.03
Employee + 2	\$ 94.53
Employee + Family	\$ 135.04

#### City of Glendale & Cartwright Premiums

Employee Only	\$ 41.01
Employee + Spouse	\$ 86.13
Employee + Child(ren)	\$ 137.40
Employee + Family	\$ 137.40





## REPORT DEFINITIONS

Column Name	Data Description
Date	Month and year for experience data reported.
Employees	Number of employees as reported by provider source.
Paid Dental Claims	Paid dental claims as reported by provider source in reported month for all claims paid since the effective date including current report month except as noted.
PEPM Fixed Expenses	This amount includes all administrative costs & third party administrator costs.
Total Paid Claims & Expenses	Estimated paid claims plus plan fixed expenses.
Contributions	Contributions calculation = employees reported by provider source during reported month times contribution rates. Prior months totals may change based on any retroactivity reported by Districts.
Surplus/(Deficit)	Total contributions less total paid claims and expenses.
Total Cost Loss Ratio	Total paid claims and expenses divided by total contributions.
Total Cost PEPM	Total paid claims and expenses divided by total employees.
Prior Year YTD Loss Ratio	Loss ratio year-to-date as of the same month in the prior year.

This data has not been audited and is presented for the sole purpose of measuring the plan performance. The accuracy and reliability of the Monthly Experience Report is dependent on the information available at the time the report was prepared. Any changes to the underlying data will affect the results reported in the Monthly Experience Report. This report will reflect any eligibility retroactively and this may lead to a restatement of prior month(s)' data.

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.E. TOPIC: Financial Review

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The financial report for June 30, 2021 reflects the "Ending net position reserved for claims and expenses" as \$16,129,139.07.



VALLEY SCHOOLS WORKERS'  
COMPENSATION GROUP

VALLEY SCHOOLS  
INSURANCE GROUP

VALLEY SCHOOLS  
EMPLOYEE BENEFITS GROUP

August 26, 2021

Valley Schools Employee Benefits Group Member

Attached is the statement of revenues, expenses and changes in net position for the twelve months ended June 30, 2021. The financial statement is prepared in accordance with the cash basis of accounting, and does not include any note disclosures.

If you have any questions pertaining to the attached statement, please contact me.

Sincerely,

A handwritten signature in black ink that reads "Laura Felten". The signature is fluid and cursive.

Laura Felten  
Chief Financial Officer

**Valley Schools Employee Benefits Group  
Statement of Revenues, Expenses and  
Changes in Net Position by District--Cash Basis  
For the Twelve Months Ended June 30, 2021**

	<b>Glendale Elementary</b>
<b>Operating revenues</b>	
Contributions	\$ 10,931,291.46
<b>Total operating revenues</b>	<u>10,931,291.46</u>
<b>Operating expenses</b>	
Paid claims	6,415,818.92
Stop loss reimbursement	(135,196.64)
Fixed expense	840,070.00
Dental pool expense	532,029.50
H.S.A. contributions	772,238.41
Health insurance premiums	13,134.60
Short term disability premiums	94,518.04
Dental premiums	17,694.53
Vision plan premiums	90,826.77
Flexible spending premums	169,124.00
Life insurance premiums	174,304.90
Prepaid legal premiums	629.00
Identity protection premiums	0.00
Wellness	68,950.80
Trust administration & mgmt.	0.00
Member administration expense	0.00
ACA Fees	3,486.96
<b>Total operating expenses</b>	<u>9,057,629.79</u>
<b>Operating income/(loss)</b>	<u>1,873,661.67</u>
<b>Non-operating revenue</b>	
Interest income	523,181.46
Change in market value	(281,711.41)
Return of net position	0.00
<b>Total non-operating revenue</b>	<u>241,470.05</u>
<b>Change in net position</b>	<u>2,115,131.72</u>
<b>Beginning net position reserved for claims and expenses</b>	<u>15,790,935.05</u>
<b>Ending net position reserved for claims and expenses</b>	17,906,066.77
<b>Minimum estimated operating reserve</b>	<u>(1,776,927.70)</u>
<b>Ending net position reserved for claims and expenses (net)</b>	<u>\$ 16,129,139.07</u>

**Beginning net position does not included estimated operating reserve. Minimum estimated operating reserve is equal to 17.63% of FY 2021 Contribution Invoice. Members not participating in VSEBG self-insured medical programs do not have a Minimum Estimated Operating Reserve.**

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.F. TOPIC: Claims Experience Review – Workers’ Compensation

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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In August, GESD logged 21 incidents and GESD incurred \$35,800 for the month.

GESD has 34 open claims recorded since 2013 and the “Paid” amount is \$2,870,168.25 compared to the “Incurred” of \$3,688,046.22.

GESD has seven (7) claimants above \$75,000 (based on the “Paid” amount) and five (5) above \$150,000. For the purpose of workers’ compensation, the stop-loss-level is \$350,000.

The “Paid” amount for the seven (7) claimants are \$2,612,271.09 or 91% of the total “Paid” amount of \$2,870,168.25 and \$3,149,789.62 or 85% of the total “Incurred” amount of \$3,688,046.22.

The average cost per individuals is:

- \$ 84,416.71 for “Paid”
- \$108,471.95 for “Incurred”



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

ORG1 DESC : ██████████

██████████	██████████	Status	██████████	██████████	██████████	Paid	Incurred
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	3,100.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	4,200.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	5,600.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	7,300.00
<b>Total: 16</b>						<b>0.00</b>	<b>25,000.00</b>

ORG1 DESC : ██████████

██████████	██████████	Status	██████████	██████████	██████████	Paid	Incurred
██████████	██████████	Open	██████████	██████████	██████████	0.00	4,200.00
<b>Total: 1</b>						<b>0.00</b>	<b>4,200.00</b>

ORG1 DESC : ██████████

██████████	██████████	Status	██████████	██████████	██████████	Paid	Incurred
██████████	██████████	Closed	██████████	██████████	██████████	0.00	0.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

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							<b>Total: 3</b>	<b>0.00</b>	<b>1,600.00</b>
<b>ORG1 DESC:</b> [REDACTED]									
[REDACTED]	[REDACTED]	<u>Status</u>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<u>Paid</u>	<u>Incurred</u>	
[REDACTED]	[REDACTED]	Open	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	0.00	5,000.00	
							<b>Total: 1</b>	<b>0.00</b>	<b>5,000.00</b>
<b>Grand Total: 21</b>								<b>0.00</b>	<b>35,800.00</b>

---



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

## Report Fields

Paid: amount paid inception to ending date listed in the report header

Incurred: amount incurred inception to ending date listed in report header

Report Parameters	
Insurer	2528
Adjusting_Office	-1
Underwriter	-1
Insured	-1
Insurance Type	ORG1 DESC
Claim Status	
Claimant Type	

Additional Report Parameters	
Additional Parameter	(TRUNC(ADD_DATE) >= to_date('08/01/2021 00:00:00', 'mm/dd/yyyy hh24:mi:ss') AND TRUNC(ADD_DATE) <= to_date('08/31/2021 23:59:59', 'mm/dd/yyyy hh24:mi:ss')) AND (1=1)





# Claim Log Summary - Body Part and Cause

As of 08/31/2021

ORG1 DESC : ██████████

██████████	██████████	Status	██████████	██████████	██████████	Paid	Incurred
██████████	██████████	Open	██████████	██████████	██████████	159,235.68	180,783.37
██████████	██████████	Open	██████████	██████████	██████████	2,841.53	9,800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	10,965.66	16,276.64
██████████	██████████	Open	██████████	██████████	██████████	0.00	3,100.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	4,200.00
██████████	██████████	Open	██████████	██████████	██████████	19,591.08	68,386.77
██████████	██████████	Open	██████████	██████████	██████████	744,641.19	958,459.20
██████████	██████████	Open	██████████	██████████	██████████	713.75	2,800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	3,648.14	3,900.00
██████████	██████████	Re-Open	██████████	██████████	██████████	6,359.12	8,852.41
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	98,732.01	152,662.64
██████████	██████████	Open	██████████	██████████	██████████	3,435.80	7,800.00
██████████	██████████	Open	██████████	██████████	██████████	160,951.11	205,161.45
██████████	██████████	Open	██████████	██████████	██████████	0.00	5,600.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	75,461.19	134,192.01
██████████	██████████	Open	██████████	██████████	██████████	159,633.27	182,711.60
██████████	██████████	Open	██████████	██████████	██████████	0.00	800.00
██████████	██████████	Open	██████████	██████████	██████████	0.00	7,300.00

██████████ Total: 23 1,446,209.53      1,956,786.09

ORG1 DESC :

██████████	██████████	Status	██████████	██████████	██████████	Paid	Incurred
██████████	██████████	Open	██████████	██████████	██████████	56,052.54	87,768.77

This report may contain confidential information and is intended only for the intended recipient. You are hereby notified that disclosing, copying, distributing or taking any action in reliance on the contents of this report is strictly prohibited.



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

		Status				Paid	Incurred
		Open				68,655.18	94,666.11
		Open				68,360.73	168,086.32

**Total: 3** **193,068.45** **350,521.20**

ORG1 DESC : [REDACTED]

		Status				Paid	Incurred
		Open				1,213,626.64	1,335,819.35
		Open				0.00	5,000.00

**Total: 2** **1,213,626.64** **1,340,819.35**

ORG1 DESC : [REDACTED]

		Status				Paid	Incurred
		Open				0.00	4,200.00

**Total: 1** **0.00** **4,200.00**

ORG1 DESC : [REDACTED]

		Status				Paid	Incurred
		Open				4,487.12	9,500.00
		Open				0.00	800.00
		Open				0.00	800.00
		Open				9,936.74	11,752.09

**Total: 4** **14,423.86** **22,852.09**

ORG1 DESC : [REDACTED]

		Status				Paid	Incurred
		Open				2,839.77	12,867.49

**Total: 1** **2,839.77** **12,867.49**



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

**Grand Total: 34**

**2,870,168.25**

**3,688,046.22**



# Claim Log Summary - Body Part and Cause

As of 08/31/2021

## Report Fields

Paid: amount paid inception to ending date listed in the report header

Incurred: amount incurred inception to ending date listed in report header

Report Parameters	
Insurer	2528
Adjusting_Office	-1
Underwriter	-1
Insured	-1
Insurance Type	ORG1 DESC
Claim Status	
Claimant Type	

Additional Report Parameters	
Additional Parameter	(claimant_status_desc <> 'Closed') AND (1=1)

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.G. TOPIC: Financial Review - Workers' Compensation

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The financial report for June 30, 2021 reflects the "Ending net position reserved for claims and expenses" as \$2,328,079.62.



VALLEY SCHOOLS WORKERS'  
COMPENSATION GROUP

VALLEY SCHOOLS  
INSURANCE GROUP

VALLEY SCHOOLS  
EMPLOYEE BENEFITS GROUP

September 7, 2021

Valley Schools Workers' Compensation Group Member

Attached is the statement of revenues, expenses and changes in net position for the twelve months ended June 30, 2021. The financial statement is prepared in accordance with the cash basis of accounting, and does not include any note disclosures.

If you have any questions pertaining to the attached statement, please contact me.

Sincerely,

Laura Felten  
Chief Financial Officer

**Valley Schools Workers' Compensation Group  
Statement of Revenue, Expenses and  
Changes in Net Position by District--Cash Basis  
For the Twelve Months Ended June 30, 2021**

	<b>VSWCP Departments Glendale Elementary</b>
<b>Operating revenues</b>	
Contributions	\$ 1,343,819.00
Cost of re-insurance	(113,455.00)
<b>Total operating revenues</b>	<u>1,230,364.00</u>
<b>Operating expenses</b>	
Paid claims	453,930.83
Subrogation/restitution/stop loss	(164,183.75)
Safety and loss control	0.00
Trust administration & mgmt.	6,502.00
Consultant service fees	2,852.24
ICA Fees	2,898.36
<b>Total operating expenses</b>	<u>301,999.68</u>
<b>Operating income/(loss)</b>	<u>928,364.32</u>
<b>Non-operating revenue</b>	
Interest income	53,367.30
Change in market value	(34,737.00)
<b>Total non-operating revenue</b>	<u>18,630.30</u>
<b>Change in net position</b>	<u>946,994.62</u>
<b>Beginning net position reserved for claims and expenses</b>	<u>1,381,085.00</u>
<b>Ending net position reserved for claims and expenses</b>	<u>\$ 2,328,079.62</u>

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.H. TOPIC: Financial Review - COVID-19 Legal Defense

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The financial report for June 30, 2021 reflects the "Ending net position reserved for claims and expenses" as \$753,826.34.





VALLEY SCHOOLS WORKERS'  
COMPENSATION GROUP

VALLEY SCHOOLS  
INSURANCE GROUP

VALLEY SCHOOLS  
EMPLOYEE BENEFITS GROUP

September 7, 2021

Valley Schools Insurance Group Member

Attached is the statement of revenues, expenses and changes in net position for the twelve months ended June 30, 2021. The financial statement is prepared in accordance with the cash basis of accounting, and does not include any note disclosures.

If you have any questions pertaining to the attached statement, please contact me.

Sincerely,

Laura Felten  
Chief Financial Officer

**Valley Schools Insurance Group  
Statement of Revenue, Expenses and  
Changes in Net Position by District--Cash Basis  
For the Twelve Months Ended June 30, 2021**

	<b>Glendale Elementary</b>
<b>Operating revenues</b>	
Contributions	\$ 750,000.00
Cost of re-insurance	0.00
<b>Total operating revenues</b>	<u><b>750,000.00</b></u>
<b>Operating expenses</b>	
Paid claims - liability	0.00
Paid claims - auto liability	0.00
Paid claims - property	0.00
Paid claims - under \$10,000	0.00
Subrogation/restitution/stop loss	0.00
Insurance premiums	0.00
Safety and loss control	0.00
Trust administration & mgmt.	0.00
Member administration expense	2,000.00
Consultant service fees	0.00
<b>Total operating expenses</b>	<u><b>2,000.00</b></u>
<b>Operating income/(loss)</b>	<u><b>748,000.00</b></u>
<b>Non-operating revenue</b>	
Interest income	10,697.25
Change in market value	(4,870.91)
Rental income	0.00
Rental expense	0.00
Depreciation expense	0.00
<b>Total non-operating revenue</b>	<u><b>5,826.34</b></u>
<b>Change in net position</b>	<u><b>753,826.34</b></u>
<b>Beginning net position reserved for claims and expenses</b>	<u><b>0.00</b></u>
<b>Ending net position reserved for claims and expenses</b>	<u><b>\$ 753,826.34</b></u>

Beginning Net Position and Ending Net Position do not include liability for IBNR  
Created on: 08/31/2021

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 5.I. TOPIC: Insurance and Wellness Update

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

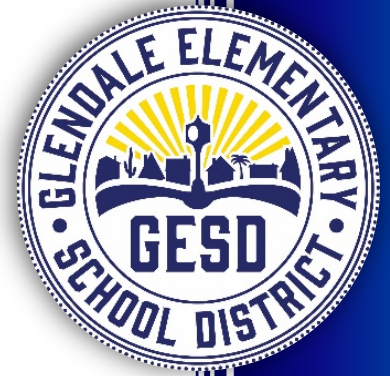
DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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Human Resources staff will present the Trust Board with Wellness and Insurance updates.

# GLENDALE ELEMENTARY SCHOOL DISTRICT No. 40

7301 N. 58<sup>TH</sup> AVENUE, GLENDALE, ARIZONA 85301 • (623) 237-7100 • www.gesd40.org



## **Benefits Team Highlights**

**Goals: Compliance / Benefits & Financial Literacy / Building Strong Partnerships**

### **September 2021**

- Attended the Valley Schools H.O.P.E. in Benefits Alliance meeting virtually
- Held initial meeting for the 22-23 Benefits Booklet development with Colonial
- The benefits and wellness team attended presentations from the following employee discount companies to review the services they offer:
  - Employee Network
  - Access Perks
  - Funex
  - Tickets at Work
- Attended the Arizona State Retirement System Employer Conference Webinar
- #KnowYourBenefits email campaigns sent out:
  - Delta Dental Pre-Treatment Estimates
  - Information on benefit deductions starting
  - Get a Second Opinion through 2nd.MD
  - Real Appeal – FREE Weight Management Program

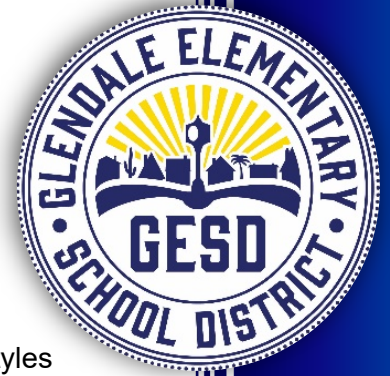
### **Wellness Updates**

- Blood Drive: We had our last blood drive on September 1<sup>st</sup> in the board room. Twenty-four people stepped up to give blood for 26 pints. Each blood drive, we give away a gift to one of the participants.
- Upcoming events:
  - Hike at North Mountain – October 2
  - Fall Break Activities – October 11-15
  - Flu Shot Clinic / Biometric Screenings – October 2

*ALL IN FOR ALL KIDS*

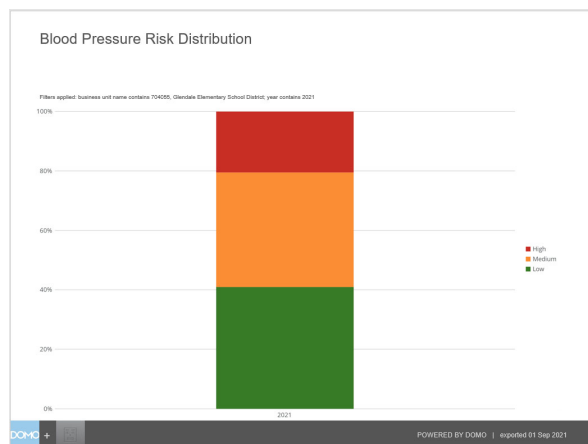
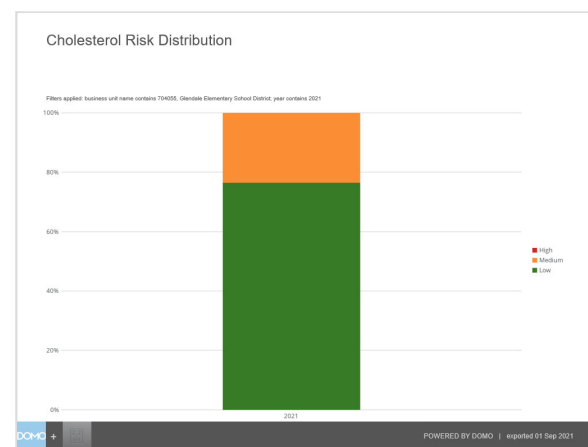
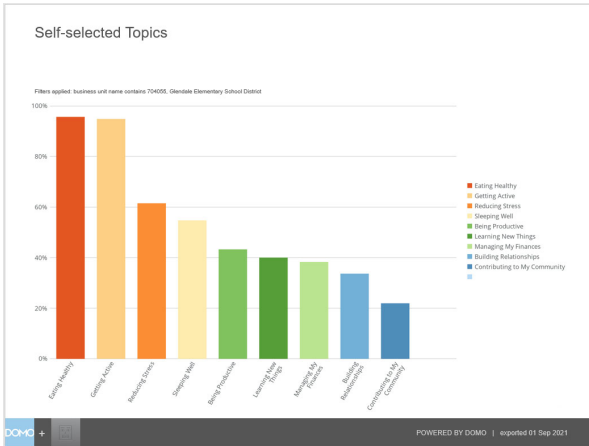
# GLENDALE ELEMENTARY SCHOOL DISTRICT No. 40

7301 N. 58<sup>TH</sup> AVENUE, GLENDALE, ARIZONA 85301 • (623) 237-7100 • www.gesd40.org



## WellStyles

- Enrollments: We currently have 54.2% (725) of our members enrolled in the WellStyles program:



*ALL IN FOR ALL KIDS*

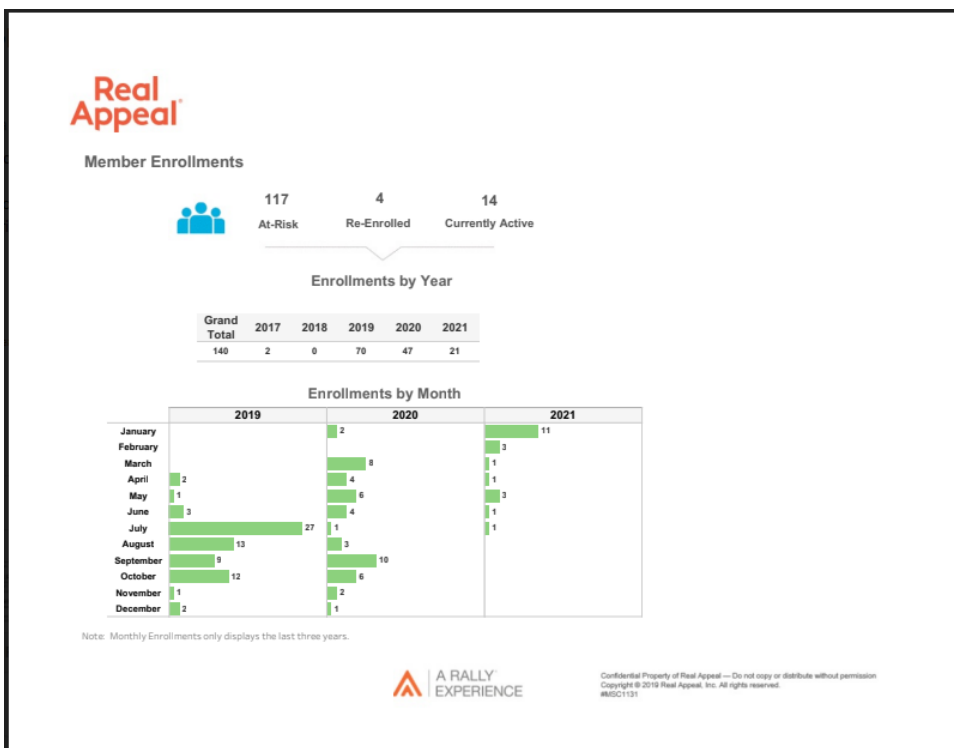
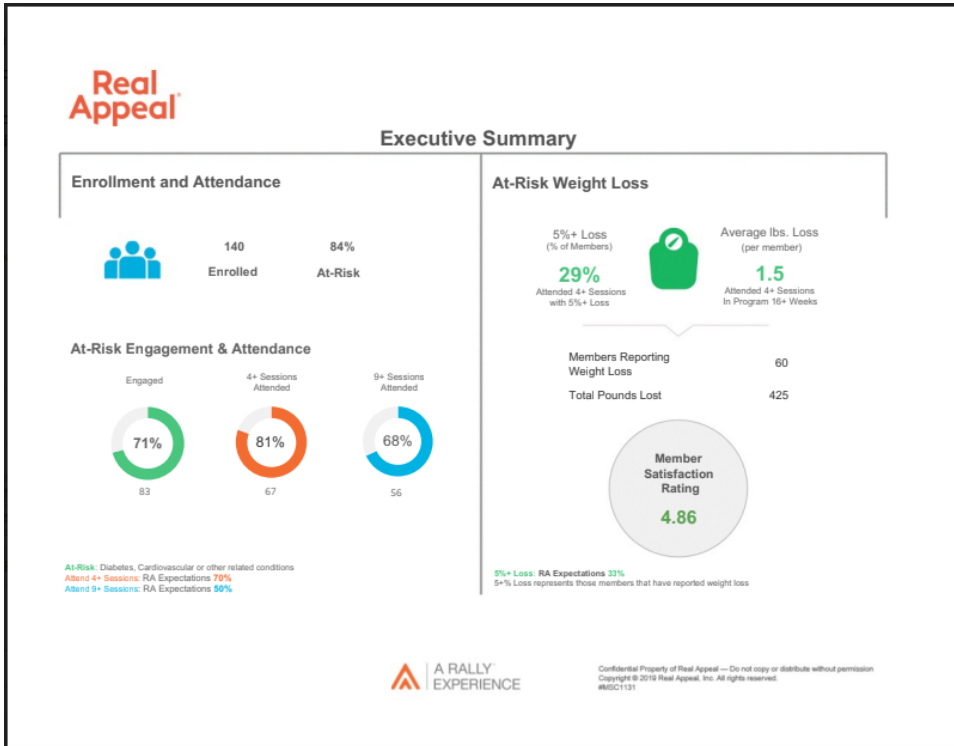
# GLENDALE ELEMENTARY SCHOOL DISTRICT No. 40

7301 N. 58<sup>TH</sup> AVENUE, GLENDALE, ARIZONA 85301 • (623) 237-7100 • www.gesd40.org



## Real Appeal

- Real Appeal participation data through August 31, 2021:
  - 140 Employees have enrolled
  - Cumulative total weight loss of 425 pounds for all members to-date



*ALL IN FOR ALL KIDS*

GLENDALE ELEMENTARY SCHOOL DISTRICT  
TRUST BOARD  
**INFORMATIONAL AGENDA ITEM**

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Reports, presentations and other similar items are submitted to the Trust Board as information and do not require action.

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AGENDA NO: 6.A. TOPIC: Trust Board Report

SUBMITTED BY: Mr. Mike Barragan, Assistant Superintendent for Finance and Auxiliary Services

DATE ASSIGNED FOR CONSIDERATION: September 22, 2021

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The Trust Board will present brief summaries of current events, if necessary.