



Agenda
Regular Session Meeting
Sedalia School District #200
Monday, January 25, 2021 6:30 p.m.
Smith-Cotton High School
Heckart Performing Arts Center

Call to Order

1.1 Call to Order

Info

Recognitions and Presentations

2.1 Public and Staff Comments

Info

2.2 School Board Recognition Week February 14 – 20

Info

2.3 Sedalia School District Foundation

Info

2.4 Sedalia Community Educators Association

Info

2.5 Approval of January 25, 2021 Agenda

Action

Consent Agenda

3.1 Minutes for Monthly Business Meeting January 11, 2020

Action

3.2 Treasurer's Report

Action

3.3 Payment of Bills

Action

Decision

4.1 Loftus Early Childhood GBH Builders ASI #21 – Door Hardware Change

Action

4.2 Loftus Early Childhood All Pro Electric Miscellaneous Electrical Add(s)

Action

4.3 Loftus Early Childhood All Pro Electric Proposal Request #8

Action

4.4 Loftus Early Childhood All Pro Electric Proposal Request #9

Action

4.5 Loftus Early Childhood Cooling Tower Concrete

Action

4.6 Loftus Early Childhood Stud Divider

Action

4.7 Loftus Early Childhood Floor Drain

Action

4.8 Notice of Election Ballot

Action

4.9 Insurance and Benefits Group Agreement

Action

4.10 Summer School 2021

Action

4.11 Van Purchase

Action

Discussion

5.1 Vocational Enhancement Grant Application

Info

5.2 COVID-19 Update

Info

Information

6.1 Building Quarterly Reports

Info

Adjournment

7.1 Adjournment to Closed Session

Action



Agenda
Regular Session Meeting
Sedalia School District #200
Monday, January 25, 2021 6:30 p.m.
Smith-Cotton High School
Heckart Performing Arts Center

Notice of Closed Meeting

Monday, January 25, 2021 immediately following the adjournment of Regular Session. Notice hereby given that the Sedalia School District #200 having duly voted to close its meeting, pursuant to Section 610.021 (1) Legal, (3) Personnel, (13) Protected Records, and (14) Records Protected from Disclosure by Law of the Missouri Statutes.

Upcoming Meeting

February 22, 2021 – Regular Board Meeting, 6:30 p.m. at Smith-Cotton High School, Heckart Performing Arts Center



Minutes
 Regular Meeting
 Sedalia School District #200
 Monday, January 11, 2020 6:30 p.m.
 Smith-Cotton High School
 Heckart Performing Arts Center

Call to Order	Dr. Sharp president, called the meeting to order at 6:30 p.m.
Present	Board Members physically present: Dr. Jeffrey Sharp, President; Scott Gardner, Vice President; Diana Nichols, Secretary; Kenny Coffelt, Treasurer, Matthew Herren, and Barbara Schrader.
Videoconference	Board Members videoconference present: Michael Stees.
Absent	
Attendees	Steve Triplett, Superintendent; Mr. Jason Curry, Assistant Superintendent; Dr. Todd Fraley, Assistant Superintendent; Chris Pyle, Assistant Superintendent; Lisa Hammerly, Recording Secretary.
Public Comments	None.
Recognitions & Pres.	Sedalia School District Foundation has more than \$60,000 in scholarships available to Class of 2021 seniors. The scholarship application is due February 10, 2021.
Approval of Agenda	Kenny Coffelt moved, seconded by Scott Gardner, that the Board approve the Agenda January 11, 2020 Agenda. Affirmative: 7
Consent Agenda	Kenny Coffelt moved, seconded by Scott Gardner, that the Board approve Minutes for Monthly Business Meeting December 14, 2020. Affirmative: 7
Calendar 2020-2021	Kenny Coffelt moved, seconded by Diana Nichols, that the Board approve the School Calendar 2020-2021 Draft 2 as presented. Affirmative: 7
Loftus Early Childhood Phones	Scott Gardner moved, seconded by Diana Nichols, that the Board approve the Loftus Early Childhood Phone Quote to Tech Electronics as presented. Affirmative: 7
FFCRA	Scott Gardner moved, seconded by Diana Nichols, that the Board approve the Families First Coronavirus Response Act (FFCRA) as presented. Affirmative: 7
COVID-19	Mr. Curry presented information for discussion on the COVID-19 Pandemic (see attachment).
Midwest Computech	Dr. Fraley presented information for discussion on the Midwest Computech Agreement.
IBT Donation	Dr. Fraley presented information for a donation from IBT Industrial Services Donation.
Mr. Triplett	Dr. Sharp, Board President acknowledged Mr. Triplett being named as the West Central district's Emerging Superintendent for 2021.



Minutes
Regular Meeting
Sedalia School District #200
Monday, January 11, 2020 6:30 p.m.
Smith-Cotton High School
Heckart Performing Arts Center

Adjournment

Kenny Coffelt moved, seconded by Scott Gardner, to adjourn to closed session for purposes listed in sections RSMo. 610.021 (3) Personnel, (13) Protected Records and (14) Records Protected from Disclosure by Law of the Missouri Statutes at 7:00 p.m.

Roll Call Vote: Kenny Coffelt-Aye. Scott Gardner-Aye. Matthew Herren-Aye. Diana Nichols-Aye. Barbara Schrader-Aye. Michael Stees-Aye. Dr. Jeffrey Sharp-Aye.

Approved this 25th day of January 2021, by order of the Board of Education, Sedalia School District #200, Pettis County, Sedalia, MO.

Diana Nichols, Secretary

Dr. Jeffrey Sharp, President



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S.
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S.
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

TO: Board of Education and Mr. Triplett

FROM: Jason Curry

DATE: January 11, 2021

SUBJECT: Covid-19 Update

Current district data:

- Staff – 15 quarantined currently (1.9%), with 2 positive (0.25%)
- Student body – 85 quarantined currently (1.86%), with 5 positive (0.11%)

State/County data:

- State positivity rate for January 1-7 = 18.2%
- Pettis county positivity rate for January 1-7 = 20.09%
- Statewide transmission rate = 1.07 (this indicates that transmission rates are still increasing across the state, but not at as significant a rate as seen in late fall 2020)

Current conditions still warrant that our mitigating measures of wearing face masks, social distancing when possible, sanitizing/disinfecting, and hand washing regularly remain in place.

BinaxNOW Antigen Testing update:

- To date we have tested 18 staff members, 5 of which were positive (27%).
- Reminder that the antigen test is developed to test only symptomatic individuals, which is why the high rate of positivity.

Vaccine update:

- District nursing staff are considered part of Phase 1a and are on a list to be scheduled for vaccination.
- All other district staff are considered part of Phase 1b. Staff have been informally surveyed to determine the amount of vaccine that potentially needs to be ordered by the county.
- More details on vaccination will be forthcoming as the rollout continues.
- We have been informed that the state intends to move through each phase collectively and not on independent timeframes.
- There are still many questions about vaccination that are yet to be answered, such as quarantine guidelines for those who have been vaccinated.

Virtual enrollment comparison:

- Elementary – 152 virtual 1st semester
102 virtual 2nd semester (50 students returned to seated instruction)

- Jr. High – 115 virtual 1st semester
79 virtual 2nd semester (36 returned to seated instruction)
- High School – 154 virtual 1st semester
165 virtual 2nd semester (149 are enrolled in our virtual program, and
16 are enrolled in other MOCAP options)
 - $149 \times \$1,575 = \$234,675$ (cost we would have paid Launch)
 - $\$234,675 - \$63,000$ (cost of our virtual) = $\$171,675$ (potential savings by providing our own virtual program)

Bank & Cash Reconciliation

Fund Cash Balance by Fund

Fund Number and Description	Cash Balance	Comments
001 - General Fund	27,285,867.51	
002 - Special Revenue Fund	2,691,757.73	
003 - Debt Service Fund	.00	
004 - Capital Projects Fund	10,838,188.31	
921 - Early Childhood Facility	.00	
Adjustment 1 :	.00	
Adjustment 2 :	.00	
Adjustment 3 :	.00	
Adjustment 4 :	.00	
TOTAL :	40,815,813.55	

Bank Cash and Reconciled Balances:

Account Code & Bank	Cash Balance	Reconciled Balance	Comments
xxxx278 - Equity Bank - ICS Public Fund	18,330,393.59	18,314,979.32	
xxxx1387 - Chris E. Egdorf - US Bank	4,975.04	4,975.04	
xxxx1251 - General Funds - MOSIP	48,812.34	48,812.34	
xxxx1252 - Capital Funds - MOSIP	59,238.35	59,238.35	
xxxx294 - Equity Bank - ICS Public Fund	21,765,616.73	21,765,616.73	
xxxx0278 - Cash Account - Equity Bank	-2,160.20	500,045.08	
xxxx0294 - Investment - Equity Bank	500,095.63	500,095.63	
xxxx0213 - Portfolio Cash - MOSIP	108,842.07	108,842.07	
Outstanding Amount: xxxx278 - Equity Bank - ICS Public Fund	.00	15,414.27	
Outstanding Amount: xxxx0278 - Cash Account - Equity Bank	.00	-502,205.28	
Adjustment 1 :	.00	.00	
Adjustment 2 :	.00	.00	
Adjustment 3 :	.00	.00	
Adjustment 4 :	.00	.00	
TOTAL :	40,815,813.55	40,815,813.55	

Bank Cash and Fund Cash are in Balance

Cash Flow Summary For month of Dec

	Fund - 001	Fund - 002	Fund - 003	Fund - 004	Fund - 921	All Funds
A. Cash Balance as of 12/01/20	21,085,332.63	1,993,700.30	0.00	9,321,283.24	0.00	32,400,316.17
B. Revenues (5XXX) :	7,352,750.09	2,733,606.85	0.00	1,568,008.56	913,470.68	12,567,836.18
C. Expenses (6XXX) :	1,276,974.77	2,619,219.51	0.00	51,103.49	913,417.24	4,860,715.01
D. Excess Revenue (B - C) :	6,075,775.32	114,387.34	0.00	1,516,905.07	53.44	7,707,121.17
E. New Cash Balance (A + D) :	27,161,107.95	2,108,087.64	0.00	10,838,188.31	53.44	40,107,437.34
F. Net Change in Fund Balance (3XXX) :	0.03	0.00	0.00	0.00	0.00	0.03
G. Net Change in Other Assets & Liabilities (1200 - 2999) :	124,759.53	583,670.09	0.00	0.00	(53.44)	708,376.18
H. Final Balance as of 12/31/20	27,285,867.51	2,691,757.73	0.00	10,838,188.31	0.00	40,815,813.55

Fund Balance Report

for the period ending December, 2020

Fund	General Fund 1	Teachers Fund 2	Debt Service Fund 3	Capital Projects Fund 4	Total
Beginning Fund Balance	26,335,742.79	-0.00	0.00	7,471,463.26	33,807,206.05
Revenues	10,782,506.68	14,222,808.34	0.00	1,737,806.76	26,743,121.78
Transfer To	0.00	0.00	0.00	2,383,625.75	2,383,625.75
Transfer From	2,383,625.75	0.00	0.00	0.00	2,383,625.75
Expenses	7,311,721.49	12,173,106.35	0.00	769,950.33	20,254,778.17
Ending Fund Balance	27,422,902.23	2,049,701.99	0.00	10,822,945.44	40,295,549.66
From General Fund to Debt Service Fund	0.00				
From General Fund to Capital Projects Fund	2,383,625.75				
Unrestricted Fund Balance (Incidental + Teachers Funds)	151.26%				

December Current Month Budget Report

Account Code	Account Description	Budget (Open Bal)	MTD Activity	YTD Activity	Current Balance	Encumbranc	Next MTC Activity	Projecter Balance	% of Budget
Fund 001 Totals	Total Assets (1xxx)	26,377,169.85	6,200,534.88	908,507.34	27,285,677.19		4,072,671.03	31,358,348.22	
	Total Liabilities (2xxx)	-36,476.7	-124,759.5	178,676.8	142,200.0		-37,707.9	104,492.1	
	Fund Balance (3xxx)	-26,340,693.07	-0.03	2,383,600.99	-23,957,092.08		0.00	-23,957,092.08	
	Total Revenues (5xxx)	21,080,762.1	7,352,750.0	10,782,506.0	10,298,256.1		5,433,010.5	4,865,245.1	76.92
	Total Expenditures (6xxx)	19,628,063.02	1,276,974.77	7,311,721.49	12,316,341.53		1,398,047.84	10,413,682.30	46.94
	Expenditures - Revenues	-1,452,699.1	-6,075,775.1	-3,470,785.1	-2,018,085.43		-4,034,963.1	5,548,437.0	
	Ending Fund Balance	-27,793,392.95	0.00	0.00	-27,427,877.27		0.00	-30,968,229.01	111.39
	Ledger Balance	0.00	0.00	0.00	0.00		0.00	0.00	
Fund 002 Totals	Total Assets (1xxx)	12,866.9	698,057.4	2,678,890.1	2,691,757.7		-435,883.4	2,255,874.2	
	Total Liabilities (2xxx)	-12,866.91	-583,670.09	-629,188.83	-642,055.74		-36,710.54	-678,766.28	
	Fund Balance (3xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Total Revenues (5xxx)	31,811,209.92	2,733,606.85	14,222,808.34	17,588,401.58		2,130,029.58	15,458,372.00	51.41
	Total Expenditures (6xxx)	34,160,862.1	2,619,219.1	12,173,106.1	21,987,755.1		2,602,623.1	19,366,592.1	43.31
	Expenditures - Revenues	2,349,652.28	-114,387.34	-2,049,701.99	-4,389,353.53		472,593.98	3,908,220.85	
	Ending Fund Balance	2,349,652.1	0.00	0.00	-2,049,701.1		0.00	-1,558,568.1	-66.33
	Ledger Balance	0.00	0.00	0.00	0.00		0.00	0.00	
Fund 003 Totals	Total Assets (1xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Total Liabilities (2xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Fund Balance (3xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Total Revenues (5xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Total Expenditures (6xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Expenditures - Revenues	0.00	0.00	0.00	0.00		0.00	0.00	
	Ending Fund Balance	0.00	0.00	0.00	0.00		0.00	0.00	
	Ledger Balance	0.00	0.00	0.00	0.00		0.00	0.00	
Fund 004 Totals	Total Assets (1xxx)	7,471,463.1	1,516,905.0	3,366,725.0	10,838,188.1		994,288.3	11,832,476.1	
	Total Liabilities (2xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Fund Balance (3xxx)	-7,471,463.1	0.00	-2,398,868.1	-9,870,331.1		0.00	-9,870,331.1	
	Total Revenues (5xxx)	3,522,944.75	1,568,008.56	1,737,806.76	1,785,137.99		1,068,359.42	726,778.57	79.37
	Total Expenditures (6xxx)	7,367,611.1	51,103.4	769,950.3	6,587,661.1		64,071.1	6,484,243.2	11.99
	Expenditures - Revenues	3,844,666.97	-1,516,905.07	-967,856.43	-4,802,523.12		-994,288.31	5,757,464.71	
	Ending Fund Balance	-3,626,796.1	0.00	0.00	-10,838,188.1		0.00	-11,783,129.1	324.89
	Ledger Balance	0.00	0.00	0.00	0.00		0.00	0.00	
Fund 921 Totals	Total Assets (1xxx)	-1,502,003.67	-961,438.39	-3,760,640.50	-5,252,644.17		0.00	-5,252,644.17	
	Total Liabilities (2xxx)	1,569,239.1	961,491.8	3,760,985.1	5,330,225.1		0.00	5,330,225.1	
	Fund Balance (3xxx)	0.00	0.00	0.00	0.00		0.00	0.00	
	Total Revenues (5xxx)	5,303,579.1	913,470.6	3,498,757.1	1,804,821.1		0.00	1,804,821.1	65.97
	Total Expenditures (6xxx)	6,694,778.47	913,417.24	3,498,412.29	3,196,366.18		0.00	3,196,366.18	52.26
	Expenditures - Revenues	1,391,198.1	-53.44	-345.31	-345.31		0.00	1,391,544.2	
	Ending Fund Balance	1,323,963.18	0.00	0.00	-345.36		0.00	-345.36	-0.03
	Ledger Balance	67,235.7	0.00	0.00	67,235.7		0.00	67,235.7	

December Current Month Budget Report

Account Code	Account Description	Budget (Open Bal)	MTD Activity	YTD Activity	Current Balance	Encumbranc	Next MTE Activity	Projecte Balance	% of Budget
Grand Total	Total Assets (1xxx)	32,359,496.:	7,454,058.:	3,193,482.7	35,552,979.:		4,631,075.:	40,184,054.:	
	Total Liabilities (2xxx)	1,519,895.73	253,062.21	3,310,473.89	4,830,369.62		-74,418.44	4,755,951.18	
	Fund Balance (3xxx)	-33,812,156.:	-0.03	-15,287.6	-33,827,423.:	0.00	0.00	-33,827,423.:	
	Total Revenues (5xxx)	61,718,497.11	12,567,836.18	30,241,879.43	31,476,617.68	0.00	8,621,399.97	22,855,217.71	62.97
	Total Expenditures (6xxx)	67,851,315.:	4,860,715.:	23,753,190.:	44,088,124.:	572,497.8	4,064,742.:	39,460,884.:	41.84
	Expenditures - Revenues	6,132,818.30	-7,707,121.17	-6,488,688.97		572,497.83	-4,556,657.46	16,605,666.90	
	Ending Fund Balance	-27,746,573.:			-40,316,112.:			-44,300,272.:	159.66
	Ledger Balance (1xxx + 2xxx + 3xxx)	67,235.75	0.00	0.00	67,235.75		0.00	67,235.75	

% of Budget for Expenditures, Revenues and Expenses - Revenues = (YTD Activity + Encumbrance + Next MTD Activity)/Budget(Open Bal)

% of Budget for Ending Fund Balance = Projected Balance/Budget(Open Bal)

Consolidated Summary Statement

Sedalia School District #200

Portfolio Summary

Portfolio Holdings	Cash Dividends and Income	Closing Market Value	Current Yield
MOSIP	7.47	216,892.76	0.04 %
Total	\$7.47	\$216,892.76	

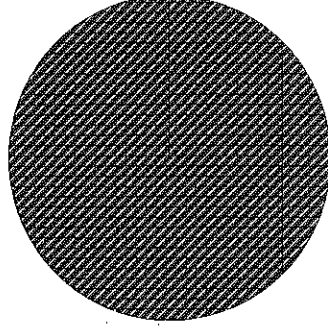
Investment Allocation

Investment Type	Closing Market Value	Percent
Money Market Mutual Fund	216,892.76	100.00
Total	\$216,892.76	100.00%

Maturity Distribution (Fixed Income Holdings)

Portfolio Holdings	Closing Market Value	Percent
Under 30 days	216,892.76	100.00
31 to 60 days	0.00	0.00
61 to 90 days	0.00	0.00
91 to 180 days	0.00	0.00
181 days to 1 year	0.00	0.00
1 to 2 years	0.00	0.00
2 to 3 years	0.00	0.00
3 to 4 years	0.00	0.00
4 to 5 years	0.00	0.00
Over 5 years	0.00	0.00
Total	\$216,892.76	100.00%

Weighted Average Days to Maturity **1**



Mny Mkt Fund
100.00%

Sector Allocation

Memorandum

To: Director – Board of Education

CC: Steve Triplett/Jason Curry/Chris Pyle

From: Todd Fraley

Date: January 25, 2021

Re: Payment of Bills

**Attached are the payment of bills from December 8 – January 19, 2021.
Total Amount of \$3,543,757.41**

BOE AP Check Register Report Dec 8 - Jan 19 2021

Selection Criteria : Check # Range From 120982 To 120999 | Check # Range From ACH015550 To ACH015655 | Check # Range From ACH015461 To ACH015539 | Check # Range From 120800 To 120980 | Check # Range From 120709 To 120798 |

Vendor Name	Amount
Total 1665 Digital	1,250.00
Total 4N6 Fanatics.com LLC	150.00
Total Ackerman, Elizabeth C	20.00
Total ACT - KS	325.00
Total ACT Inc	6,138.00
Total AG Coop Services Inc	4,776.35
Total Amos, Brian C	20.00
Total Anthony, Lacey M	268.50
Total Aramark Uniform Services	3,951.36
Total AT&T Mobility	993.43
Total B & H Well Drilling and	284.21
Total B and P Excavating LLC	655.00
Total Barbour, Trenton	141.00
Total Barklage, Deanna L	20.00
Total Barton, Kendra A	148.67
Total Bates, Melissa	120.00
Total Bax Jason J	182.00
Total Beaufort County Family Court	961.80
Total Benner, Daniel	20.00
Total Benton, Victor	410.00
Total Bergman, Sarah	2,000.00
Total Bintner, Connie S	100.00
Total Bintner, Robert J	178.00
Total Bird, Anna M	613.44
Total Black Dawn M & C LLC	180.00
Total Blaisdell, Jerry	20.00
Total Blick Art Materials	143.56
Total Blue Cross Blue Shield of KC	908,292.66
Total Boone, Joseph	75.00
Total Bourbina, Danielle E	51.51
Total Branson Lucas W	344.00
Total Brant, Kyra S	20.00
Total Brockway Ronald D	360.00
Total Brodart Co	129.13
Total Brodersen Sand and Gravel	318.96
Total Brownfield, Rebecca L	270.00
Total Bryan, Kelly M	20.00
Total Buescher, Kimberly L	41.75
Total Busen Evan J	110.00
Total Byrd David J	182.00
Total Calafaty, Cindy M	25.00
Total Campe, Marsha K	50.65
Total CanoRomero, Mireya	20.00
Total Carolina Biological Supply Co	69.95
Total Carroll, Kasandra	100.00
Total Caruthers, Kimberly S	612.81
Total CDW LLC	125.46
Total Charlesworth Consulting LLC	8,100.00
Total Charter Communications	45.51
Total Child Safe of Central Mo Inc	100.00
Total City of Sedalia Mo	10,229.90
Total City Safe and Lock Service	175.60
Total Claim Care Inc	2,977.28
Total Clark, Dilbert G	20.00
Total Clark, Patricia D	268.50
Total Collegiate Awards	182.25
Total Coons Robert D	120.00
Total Crescent Parts and Equipment	1,579.16
Total Crisis Prevention Institute	150.00
Total Curry, Jason G	170.00
Total Curry, Katherine M	268.50
Total Curry, Robert J	20.00

BOE AP Check Register Report Dec 8 - Jan 19 2021

Vendor Name	Amount
Total Curry, Stacy L	264.07
Total Custom Meeting Planners Inc	300.00
Total Customink LLC	304.29
Total Dailey, Olivia J	41.75
Total Davis, Robert P	40.00
Total DC Battery	124.00
Total DECA Inc	110.00
Total Demco Inc	168.18
Total Dickson, Stephanie L	965.00
Total Dillon, Randy A	240.00
Total Discount School Supply	2,648.50
Total DISH	55.04
Total Ditzfeld Container Service LLC	1,674.36
Total Doyle, Joseph G	20.00
Total Drum, Jesse	20.00
Total Dugan Glass Inc	8,261.30
Total Eastbay Inc	7,996.40
Total Elite Linen Service	345.61
Total Ellis Ellis Hammons & Johnson PC	2,186.30
Total Evergy	115,151.90
Total Excelsior Springs School Dist #40	300.00
Total Faber and Brand LLC	212.96
Total Fastenal Company	23.13
Total FBLA PBL	150.00
Total FCCLA	182.00
Total Federal Program Consulting Inc	1,500.00
Total First Student Inc	195,551.70
Total Fraley, Eric T	202.48
Total Frazee William C	318.00
Total Fry, Jeremy D	84.66
Total General Parts LLC	252.51
Total Gilmore, Devon R	170.00
Total Grandview R-2 School District	13,146.29
Total Great Circle	2,125.00
Total Guardian Life Insurance Co.	34,650.45
Total Hagedorn, Bradley J	157.50
Total Hammerly, Lisa A	20.00
Total Hammond, Marlin	114.00
Total Haney, Laura	2,000.00
Total Hanks Portables & Septic	510.00
Total Harris, Monica L	64.87
Total Hawkins, Keith D	20.00
Total Hawkins, Michael C	110.00
Total Heartland Vision Consultants Inc	2,100.00
Total Herrick, Timothy C	20.00
Total Hieronymus, Brett R	20.00
Total Hiland Dairy Foods	16,441.61
Total Hirschvogel Jason C	120.00
Total Houghton Mifflin Harcourt	25,103.74
Total Howieson, Carrie L	20.00
Total Hubbs, Justin	20.00
Total Hughes, Phelessia R	91.75
Total Hunsaker, Shawn C	60.00
Total Husong, Marcinda M	76.16
Total IBT Inc BIN 150031	6,829.24
Total Ice Masters	3,047.70
Total Instructure Inc	5,000.00
Total Insurance and Benefits Group	13,901.32
Total Internal Revenue Service	590,081.98
Total Interstate Studio & Publishing Co	100.00
Total Jackson Stephanie E	20.00
Total Jackson William Benjamin	310.00
Total Jackson, Stefan	240.00
Total JAG	125.00

BOE AP Check Register Report Dec 8 - Jan 19 2021

Vendor Name	Amount
Total Janke, Lakin R	73.00
Total Jefferson City School District	325.00
Total Johnson, Melissa D	752.12
Total Johnston, Chris D	20.00
Total Jones, Deanna R	127.50
Total Jones, Sam B	3,500.00
Total Jonson, Kristie A	20.00
Total Jostens Inc	1,356.24
Total JourneyEd.com Inc	465.90
Total Juan, Adriana	20.00
Total Junior Library Guild	2.40
Total JW Pepper and Son Inc	647.84
Total Kansas City Audio Visual	1,048.00
Total Kast, Karla S	20.00
Total Keller Fire and Safety Inc	241.00
Total Kemna Gene Scott	110.00
Total Kennedy, Steve A	20.00
Total Kimminau, Gregory T	208.00
Total Kindle, Jason P	139.52
Total Knox, Steven	124.00
Total Koetting, Tamara S	96.12
Total Kuka, Corina	20.00
Total L & R Specialties	1,407.50
Total Lane, Steven D	20.00
Total Leafy Julieah	2,000.00
Total Lee, Dylan	340.00
Total Library Store Inc	1,522.74
Total Linderman, Victoria	28.00
Total Lookout Books	399.99
Total Lowes Companies Inc	2,663.54
Total Luebbert Daniel W	192.00
Total Lynn, Kelsey E	91.75
Total Magana, Melissa P	20.00
Total Makings John	180.00
Total Marcums Landscaping Stones LLC	360.40
Total Marnholtz, Chad M	130.00
Total Marsh, Aaron	120.00
Total MartinezFlores Maria G	20.00
Total Mathieu, Gerard J	20.00
Total Matz, Elizabeth	2,000.00
Total McFail, Lauren E	91.75
Total McMaster-Carr Supply Company	265.51
Total McNeal, Mark A	19.17
Total McPheeters, Roger	110.00
Total MDHE Collections Custodial Account	122.52
Total Medco Supply Company	111.46
Total MedinaFlores, Rosario	119.00
Total MEI Total Elevator Solutions	1,493.28
Total Meisenheimer, Cole W	266.75
Total Menard Inc	423.47
Total Menjivar, Ana G	20.00
Total Meyer Laboratory Inc	2,431.50
Total Meyer, Angela M	20.00
Total MFA Agri Ser-Sedalia	19.50
Total Mid Atlantic Trust Company	73,431.64
Total Midwest CompuTech	1,650.00
Total Midwest Public Risk of MO	226,592.65
Total Miner, Monica	100.00
Total Miracle Recreation Equipment Co	254.00
Total Missouri Department of Revenue	112,484.00
Total Missouri FBLA	130.00
Total Missouri NEA	1,346.00
Total Missouri Veterans Home	88.00
Total MO Family Support Payment Center	3,092.00

BOE AP Check Register Report Dec 8 - Jan 19 2021

Vendor Name	Amount
Total MOAQUA Ltd	463.50
Total Moon, Cindy G	3.67
Total Moon, Pamela S	20.00
Total Moores Flower Shop & Greenhouse	885.00
Total Morgan Co R-II School District	150.00
Total Morrison, Katherine E	7.02
Total MSBA	2,353.26
Total MSTA	25,918.00
Total Myers, Linda S	20.00
Total Newton, Cheridan R	17.55
Total Nichols, Michael Eugene	135.00
Total Nightwatch Security & Telephone	3,971.98
Total Noland, Ashleigh J	233.84
Total Normandy School District	770.68
Total O'Reilly Auto Parts	36.72
Total Oriental Trading Co Inc	108.31
Total Otten Small Engine LLC	26.78
Total OverDrive Inc	117.67
Total Ownby, Jessica	10.00
Total Papa Jakes Donut Shop	84.00
Total Payette, Mark	57.00
Total Pearson Inc	344.26
Total PEERS	106,504.90
Total Perma Bound	1,696.76
Total Petterson, Roxanne N	20.00
Total Pettis County Circuit Clerk	1,249.07
Total Pettis County Sheriffs Office	13,291.01
Total Phillips and Company-Sedalia	7,288.64
Total Phillips Media Group LLC	206.20
Total Pioneer Valley Books	294.80
Total Pitney Bowes	507.90
Total Pizza Hut	322.75
Total Polk, Jordan K	20.00
Total Porter Berendzen & Associates, P.C.	9,735.00
Total Praxair Distribution Inc	356.16
Total Project Lead The Way Inc	276.00
Total PSRS	567,499.90
Total Pumfills Sporting Goods	5,236.00
Total Purchase Power	1,510.00
Total Pyle Patrick K	20.00
Total Pyle, Christopher L	170.00
Total RAC-JAC Properties Inc	137.00
Total Rack Performance LLC	2,500.00
Total Randall, Keith	252.00
Total Rangel, Norma G	41.75
Total Raynor Garage Door Sales	305.00
Total Rebecca Speier, Berman & Rabin	649.20
Total Reedy, Lesther M	20.00
Total Reeves-Wiedeman Company	8,615.64
Total Renaissance Learning Inc	2,716.25
Total Ricoh USA Inc	35,332.91
Total Riverside Insights	309.25
Total Robert A Truener Masonry	2,115.00
Total Roberts, Brett A	100.00
Total Rodriquez Jr, Miquel A	284.00
Total Royal Papers	1,792.08
Total Russell, Amy A	5.35
Total S & S Worldwide Inc	305.48
Total Sadler, Tammy L	41.25
Total Satnan, Robert H	170.00
Total Schlup Jr, Kenneth F	20.00
Total Schneider, Amy	100.00
Total Scholastic Inc	521.95
Total School Specialty Inc	822.44

BOE AP Check Register Report Dec 8 - Jan 19 2021

Vendor Name	Amount
Total Schulte, Scott E	172.00
Total Scott, Charlie	110.00
Total Scott, Tara D	37.33
Total Sedalia Chamber of Commerce	500.00
Total Sedalia Rental and Supply	279.90
Total Sedalia Rotary Club	145.00
Total Sedalia School District 200	1,960.00
Total Sedalia School District 200	11,457.68
Total Sedalia School District Foundation	2,202.52
Total Septagon Construction Mgmt Inc	45,570.60
Total Seyer Kenneth J	172.00
Total Sherman, Joel R	40.00
Total Shults, Jesse	22.00
Total Silvey, Nicole L	20.00
Total Simoncic, Amy L	5.56
Total Simons Jr, Richard D	20.00
Total Skidmore Luke	220.00
Total SMC Electric Supply	96.58
Total Smith, Casey D	20.00
Total Snyder, Candice	100.00
Total Social Studies School Services	156.63
Total Socket Telecom LLC	6,348.91
Total Software Finesse LLC	700.00
Total SonEquity Pest Management	1,758.00
Total Specialty Sportswear	5,594.00
Total Spratley, Brooke A	20.00
Total Springfield Grocer Company Inc	61,451.33
Total Staples Business Advantage	782.21
Total Stock, Michael D	133.00
Total Stock, Steven E	110.00
Total Stone Laser Imaging	83.00
Total Stratton, Nicole A	60.00
Total Symmetry Energy Solutions LLC	2,794.96
Total Synchrony Bank/Amazon	2,839.25
Total T Mobile	127.15
Total Tackett, Erika	2,000.00
Total Tankersley, Jerry D	20.00
Total Therapro Inc	91.92
Total Thomeczek & Brink LLC	3,797.50
Total Tomo Drug Testing	332.00
Total Triplett, Linda M	6.59
Total Triplett, Steven G	320.00
Total Tyler Business Forms	1,418.78
Total Uline Inc	237.68
Total UMB Healthcare Services	58,850.40
Total UPS Store	12.76
Total Valesa, Yelena M	20.00
Total Van Loo, Brock H	110.00
Total Vaughan Pools of Sedalia	5,372.00
Total Verizon Wireless	202.14
Total Vex Robotics Inc	1,683.68
Total Volk, Lisa L	20.00
Total W & M Welding Inc	210.36
Total W Schiller and Company Inc	24,675.00
Total WageWorks	3,751.55
Total Walker, Sarah R	63.20
Total Walmart Community/RFCSELLC	8,389.46
Total Walters, Mary A	313.50
Total Warehouse Tire and Muffler	831.95
Total Watson, Garrett	20.00
Total Weigand, Lindsay M	612.81
Total Wells, Kylee B	268.50
Total Wendt, Ashley N	80.00
Total Wenig, Debra L	952.75

BOE AP Check Register Report Dec 8 - Jan 19 2021

Vendor Name	Amount
Total West Central Area LASE	10.00
Total Westlake Hardware	1,046.38
Total WEX BANK	8,629.65
Total Wheeler, Gary D	170.00
Total Whorton, Corie L	41.75
Total Williams, Andrew K	110.00
Total Willson, Gregory B	85.25
Total Wise, Amy	20.00
Total Woods Super Markets Inc	24.08
Total Woolery, Denise R	20.00
Total Worlds Finest Chocolate	1,595.00
Total Wyatt, Robin C	178.88
Total Wyrick, Adam R	110.00
Total Zayats, Yekaterina	20.00
Total Zerbey, Greg	20.00
Total Zimmerman, Kyle D	64.99
Grand Total	3,543,757.41

Memorandum

To: Director – Board of Education

CC: Steve Triplett/Jason Curry/Chris Pyle

From: Todd Fraley

Date: January 25, 2021

Re: Payment of Bills with P-Card

**Attached are the payment of bills using the P-Card from December 8 – January 19, 2021.
Total Amount of \$33,513.87**

BOE AP P-Card Report Dec 8 - Jan 19, 2021

Vendor Name	Amount
Total Accredited Security	5,391.00
Total Airgas USA LLC	78.58
Total ALDI	29.99
Total American SpindleTechnology	976.00
Total Apple Inc	119.00
Total Applied Magnets Inc	50.04
Total Bandanas Bar-B-Q	129.51
Total Bath and Body Works	163.89
Total Best Donuts	102.90
Total Big Lots Stores	33.50
Total Brainspring	99.00
Total C O Port LLC	342.86
Total Dairy Queen	150.98
Total Dollar General	132.63
Total Dollar Tree	227.00
Total Dominos Pizza	193.69
Total Don Johnston	4.99
Total Eastbay Inc	86.62
Total Fastenal Company	38.70
Total Fazolis	99.82
Total Fluency and Fitness	890.00
Total General Parts LLC	408.01
Total Harbor Freight	240.70
Total Hobby Lobby Stores Inc	220.84
Total JCPenney	335.37
Total Jims Tire Service Inc	110.00
Total Kohls	232.10
Total Learning A-Z	346.35
Total Life Tributes Sympathy	109.90
Total Little Caesars Pizza	110.00
Total Lowes Companies Inc	10.96
Total MAESP	1,495.00
Total Main Street Logo	149.00
Total Mazzios Corporation	58.95
Total Menard Inc	655.93
Total MMEA	50.00
Total Mo Typewriter of Wrbg Inc	40.00
Total MOPATA	25.00
Total MSBA	180.00
Total NASSP/NHS	85.00
Total NewspaperArchive.com	74.95
Total Newspapers.com	74.90
Total Northern Tool	368.96
Total Odessa Winsupply Co	630.07

Total O'Reilly Auto Parts	19.99
Total Oriental Trading Co Inc	245.59
Total Panera LLC	576.98
Total Papa Murphys	627.58
Total Pearson Inc	5,740.00
Total Perkins Restaurant	100.33
Total Pizza Hut	36.88
Total Rhino Fleet Tracking	67.80
Total RUE21	87.44
Total Sams Club	895.10
Total Scholastic Inc	171.57
Total Shoe Sensation	49.00
Total Staples Business Advantage	74.46
Total Sutherland Lumber Company	115.84
Total Swerve Drive Specialties	2,999.88
Total Tactical Gear	414.13
Total TJ MAXX	272.86
Total UPS Store	33.36
Total Vex Robotics Inc	2,279.61
Total Walgreen Drug Stores	7.70
Total Walmart Community/RFCSLLC	2,194.45
Total Webstaurant Store	143.48
Total WestCoast Products & Design LLC	818.00
Total Whites Dry Cleaners	37.33
Total Woods Super Markets Inc	151.82
Grand Total	33,513.87

Septagon Construction Management, Inc.

Status Report

**Sedalia School District #200
New Early Childhood Center**

School Board Meeting: January 2021

Prepared: January 15, 2021

Table of Contents

Item	Section
Project Manager's Report	1
Budget	2
Action Items	3
Pending Items	4

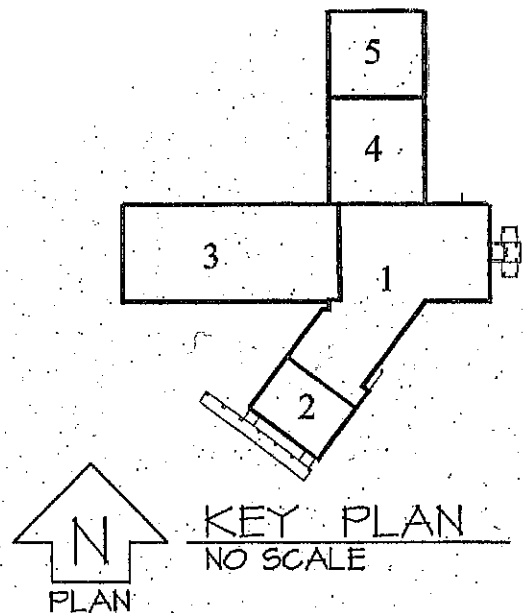
Project Manager's Report

Since the last report the masonry has been completed in all area's, building steel has been completed in all area's, the front entrance canopy steel has been completed, the lower roof is nearing completion, the gutters and downspouts have been installed, the skylight has been placed, the front entrance metal wall panels and the Area 2 Multi-purpose metal wall panels are placed, the storm shelter concrete roof was poured with the roofing nearing completion at Area 2, the roof top mechanical unit's have been placed on the lower roof, the east parking lot has been poured along with the sidewalk leading to the front entrance. The Geothermal field has been completed in the playground area and is now completed to the mechanical room in the building underground.

The steel studs have been placed throughout the building, the sheetrock has started, all of the windows are in place, doorways have been temporarily installed, and painting has started. MEP rough-in has continued with mainly above ceiling rough-in left to do.

The focus in the coming weeks will be to complete roofing, start Area 2 bus drop off canopy footings, continue above ceiling MEP, sheetrock along with mud and tape, continue painting, and continue exterior metal trim-out. This month we have a few items needing the School Board's action.

Robby Paul
Septagon Construction Management
January 15, 2021



Budget

Sedalia School District #200
Sedalia, MO
Loftus Early Childhood Center
Compiled by Septagon Construction

Description	Summary	Previous Invoices	This Month	Accumulative Totals	Remaining To Be Paid
31A Civil - B & P Excavating, LLC	\$ 659,127.00	\$ 549,269.20	\$ -	\$ 549,269.20	\$ 109,857.80
Change Order 31A-001	\$ 10,513.00				
Civil Change Allowance	\$ 15,873.00				\$ 15,873.00
2A Civil Concrete - Ramey Construction Co. Inc	\$ 463,500.00	\$ 123,500.00	\$ -	\$ 123,500.00	\$ 340,000.00
2B Fencing - C-R Fence	\$ 13,422.00	\$ -	\$ -	\$ -	\$ 13,422.00
3A General Construction - GBH Builders, Inc	\$ 3,439,256.54	\$ 1,801,867.69	\$ 189,829.90	\$ 1,991,697.59	\$ 1,447,558.95
Change Order 3A-001	\$ 14,593.90				
Change Order 3A-002	\$ 18,077.06				
Change Order 3A-003	\$ 15,695.58				
4A Masonry - Robert A. Treuner Masonry	\$ 1,275,797.00	\$ 1,212,007.15	\$ -	\$ 1,212,007.15	\$ 63,789.85
Change Order A-001	\$ (16,721.00)				
9A Flooring & Base - Interior Surface Enterprises, LLC	\$ 194,765.00	\$ -	\$ -	\$ -	\$ 194,765.00
11A Food Service Equipment - Care Sales & Services	\$ 117,816.88	\$ -	\$ -	\$ -	\$ 117,816.88
15A Fire Sprinkler System - Ozark Fire	\$ 106,020.00	\$ 63,726.00	\$ 25,612.00	\$ 89,338.00	\$ 16,682.00
15B Mechanical HVAC - QuesTec Mechanical	\$ 1,378,150.00	\$ 909,429.23	\$ 91,200.00	\$ 1,000,629.23	\$ 377,520.77
16A Electrical - All Pro Electrical	\$ 578,948.40	\$ 329,098.33	\$ 53,749.01	\$ 382,847.34	\$ 196,101.06
Change Order 16A-001	\$ 3,070.50				
Change Order 16A-002	\$ 1,138.50				
Change Order 16A-003	\$ 23,639.40				
Porter Berendzen Associates	\$ 486,750.00	\$ 428,340.00	\$ 9,735.00	\$ 438,075.00	\$ 48,675.00
Survey, Geotech, Testing, misc	\$ 105,000.00	\$ 39,428.00	\$ -	\$ 39,428.00	\$ 65,572.00
Septagon CM Fee	\$ 312,000.00	\$ 212,000.00	\$ 16,000.00	\$ 228,000.00	\$ 84,000.00
General Conditions	\$ 370,000.00	\$ 193,819.45	\$ 16,525.60	\$ 210,345.05	\$ 159,654.95
Contingencies	\$ 413,574.18	\$ -	\$ -	\$ -	\$ 413,574.18
Furnishings	\$ 250,000.00	\$ -	\$ -	\$ -	\$ 250,000.00
Other Items					
Budget w/out furnishings, data, and phones	\$ 10,180,000.00	\$ 5,862,485.05	\$ 402,651.51	\$ 6,265,136.56	\$ 3,914,863.44

\$ 3,914,863.44

James 01-11-21

Items Requiring Action

1. ASI #21 - Door Hardware Change: Per the Districts request, GBH Builders submitted a proposal for all mortised locksets to change from key/inside cylinder to rotating inside lever with visual indicator. This is a cost of \$8,889.19.
2. All Pro Electric - Proposal #4: Miscellaneous Electrical Add's - Additional Three Way Switch by Door 111, Temporary power to Pole Lights for security, Conduit and back box rough-in for additional power assist at Doors 101, 102 and 199, Provide (2) 100 foot 10-3 extension cords for Temporary heaters, and Rough-in for (4) additional door magnet locations (double doors 134 and 167). Includes providing 24 volt power through a fire alarm relay so that they release upon alarm. This is a cost from All Pro Electric of \$2,317.25.
3. All Pro Electric - Proposal Request #8: Run 3" EMT conduit sleeves from the IT room through the hard ceiling around the Skylight to each corridor wing in lieu of the cable tray shown on the drawing. This is a cost from All Pro Electrical of \$2,886.50
4. All Pro Electric - Proposal Request #9: Replace the Type L1 light fixture outside of door 199 with a can light with an emergency driver. This is a cost from All Pro Electric of \$423.40.
5. Request to move forward on a Time & Material basis for the cooling tower concrete pad that was not captured on the drawings or specifications. This will be a budget of \$2,000.
6. Request to proceed on a Time & Material basis on Added stud divider wall in Classroom restrooms and other miscellaneous studs and drywall changes as we progress where needed.
7. Request to proceed on a Time & Material basis to add a floor drain and waterline for the combination oven/steamer in the Kitchen that was not on the drawings.

Pending Items

1. Zip line, Swings and other point loads to the structure
2. Color Selections
3. ASI related items
4. Exterior Playground equipment, concrete, and poured in place surfacing
5. Landscaping
6. Cost of ASI #29 - Front Entry Canopy Details - This consist of closing off area's with trims and closures added to reduce bird perching locations.

**NOTICE OF ELECTION
SEDALIA SCHOOL DISTRICT #200
PETTIS COUNTY, MISSOURI**

Notice is hereby given to the qualified electors of the Sedalia School District #200, Pettis County, Missouri, that the annual school election will be held in said District on general municipal election day, Tuesday, the 6th day of April, 2021 commencing at six o'clock a.m. and closing at seven o'clock p.m., on said date, for the purpose of submitting to the qualified electors of said District the following:

ELECTION OF DIRECTORS

To elect two (2) members of the Board of Education each to serve for a term of three (3) years.

**3 YEAR TERM
(VOTE FOR 2)**

**MATTHEW HERREN
SAMUEL R. KEMPTON
MICHELLE QUATTLEBAUM**

Done by order of the Board of Education on this 25th day of January, 2021.

**Diana Nichols, Secretary
Board of Education
Sedalia School District #200**



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

DATE: January 25, 2021

TO: Mr. Triplett and Board of Education

FROM: Dr. Todd Fraley

RE: Insurance Broker Agreement

The district is recommending that the Board of Education approve IBG/Assured Partners to continue representing the Sedalia School District. The district hired Charlesworth Consulting Inc. which conducted an RFQ and facilitated a vetting/interview process with several brokerage companies.

The district formed an interview committee consisting of Todd Fraley (Assistant Superintendent), Linda Myers (Administrative Assistant), Mr. Kenneth Coffelt (Board Member), Mr. Scott Gardner (Board Member), Shelley Lutjen (SCEA certified staff representative), and Holly Blackaby (SCEA classified staff representative). Mr. Bob Charlesworth, consultant, led the interview process. The companies interviewed included Lockton, CBIZ, Hays, and IBG.

All four companies offered the district adequate resources to handle the district's brokerage needs. All four companies exhibited particular strengths and potential liabilities. The district feels the long-standing relationship and local access to resources makes IBG the preferred broker for the Sedalia School District.

Please see attached documentation on the agreement and the RFQ process.

If you have any questions, please contact me at 660-829-6456. Thank you.

This agreement made and entered into effective this 1st day of February, 2020, by and between Sedalia School District #200, having offices at _____ (herein referred to as "Client"), and _____ having offices at _____ (herein referred to as "Broker").

Client wishes to procure service services that can be performed by Broker; and Broker is to provide and desires to render to Client such services; and

The parties agree that it would be in their mutual advantage to execute this Agreement and thereby define the terms and conditions that shall control the rendering of services provided to Client by Broker.

Now, therefore, in consideration of the foregoing recitals, the mutual promises contained herein and consideration, the parties agree as follows:

A. Service Period

This agreement will be in effect from the effective date above on an annual basis to subsequently follow Calendar Years and shall automatically renew for annual periods unless earlier termination in accordance with the provisions of this agreement.

B. Service Compensation

All benefit consulting/broker services provided by Broker will be performed for commission-based compensation. Client acknowledges that, except as otherwise provided herein, such compensation may include certain incentive compensation Broker may receive as a result of being the Client's broker. Client consents and agrees to Broker's ability to receive such additional compensation under all circumstances. Each year, the Broker is to provide a summary of such compensation that best reflects the direct received income from ALL sources related to the Client's business. Both parties agree that such amounts may be a form of discussion on possible modifications and/or additional service requests, not unreasonably withheld. Attachment A is a summary of the anticipated commissions/direct bonus amounts to be received by the Broker – to be updated annually by the Broker for full disclose to the Client.

C. Standard Services

Financial & Cost Management

- Assist in developing short-term and long-term strategic benefit plan objectives and initiatives
- Contribution modeling
- Plan value modeling
- Provide education and strategy development on cost management programs
- Continue to monitor and identify opportunities for optimum plan efficiency

- Negotiate all terms and provisions based on Client's objectives and goals

Renewal and Marketing

- Negotiate renewals in effort to secure most cost effective contract
- Prepare and distribute Request For Proposal (RFP) when marketing is necessary
- Direct and coordinate marketing process and carrier data requests
- Prepare and present marketing analysis
- Negotiate and monitor performance guarantees within vendor contracts
- Make recommendations regarding appropriateness of risk levels
- Assist with annual enrollment process
- Perform due diligence on any potential new benefit offerings
- Analyze fully-insured vs. self-funded plan options

Consulting and Analytics

- Provide monthly analysis of medical, dental and prescription claims
- Population Health Management
- Plan Disruption Analysis
- Forecasting and Predictive Modeling
- Data Warehouse
- Plan Design & Funding Models
- Benchmarking
- Pharmacy Analytics

Wellness and Health Risk Management

- Engage the Client's benefits committee to establish a long term vision and business plan for the Wellness Program
- Evaluate external vendors to deliver programs in a HIPAA compliant format
- Work with the Client to build programming to identify clinical risk and over time introduce programming to reduce population clinical risk
- Track wellness program metrics such as participation and prevalence of specific risk factors to gauge progress

Compliance

- Review contracts for accuracy, compliance and completeness
- Proactively advise on legislative/tax changes with potential impact to Client's benefit plans (compliance updates)
- Monitor legislative compliance of plans
- ERISA Compliance Team
- SPD Review & Plan Documents

Administrative

- Provide benefit coordinators HR tools
- Provide assistance with carrier service issues (i.e. claims, billing, etc.)

- Assist management team with reporting and meeting preparation
- Participate in board and committee meetings as requested
- Coordinate with medical and pharmacy vendors to obtain data and information
- Assist in evaluation and implementation of enrollment and eligibility system

Communication

- Provide full access to Broker library of existing communication content including newsletters, site articles, poster templates, postcard templates and enrollment support materials
- Develop basic written and visual employee benefit-related communication materials

D. Contract Terms

- Broker’s goal is to become Client’s most trusted outside advisor for many years to come. If for some reason Client is not satisfied with Broker’s work, Client may terminate this agreement at any time.
- The term of this agreement an annual agreement that is renewable for four (4) additional years at the discretion of the Client. The agreement may be extended beyond that date, if mutually agreed, in one-year terms.
- This agreement shall be governed for all purposes by the laws of the State of Missouri.
- Broker acknowledges that the nature of its relationship with Client is one in which Client shall entrust Broker as the custodian of certain of Client’s information, some of which may be of a confidential or proprietary nature. Broker shall undertake all reasonable efforts to maintain the integrity of all of Client’s information, whether or not such information is confidential or proprietary.
- This is a working document and cannot be altered unless agreed to by Broker and Client.

E. Signatures

Sedalia School District

Broker

Signature Date

Signature Date

Title

Title

Attachment A
Sedalia School District & BROKER

Service	Annual Premium	Est Comm %	Estimated Fee
Medical (BlueKC):	\$ 5,600,000.00	1%	\$56,000
LTD District Paid:	\$ 10,500.00	10%	\$1,050
Basic Life/AD&D District Paid:	\$ 14,500.00	10%	\$1,450
<i>Voluntary Benefits -</i>			
Base and Buy-Up Dental:	\$ 172,500.00	10%	\$17,250
Accident Plan	\$ 6,500.00	10%	\$650
Short Term Disability:	\$ 19,460.00	10%	\$1,946
Voluntary Life and AD&D	\$ 70,570.00	10%	\$7,057
Cancer	\$ 15,000.00	10%	\$1,500
Vision	\$ 76,600.00	10%	\$7,660
Net Cost to School District/EE's:			\$94,563
Estimated Administrative Fee paid to Broker directly from Blue KC	700	\$ 5.75	<u>\$48,300</u>
Broker Total Annual Compensation			\$142,863

Sedalia School District Benefits Insurance Timeline and Responsibilities

Task	2019	2020	2021
Open Enrollment:			
Send New Rate Info and Coverage to Employees	Central Office	Central Office	IBG
Send New Rate Info and Coverage to Retirees and COBRA	Central Office	Central Office	CO-Linda
Make OE Information Packets or Send Employee Navigator Email	Central Office	IBG	IBG
Set Up Employee Information Meeting Prior to OE	Central Office	Central Office	Video w/sign off
Set Open Enrollment Schedule If Visiting Each Building	Central Office	NA	IBG
Enter All Changes in Blues Enroll and Guardian, Employee Navigator	IBG	IBG	IBG
Make Sure All Employees Signed Off or Entered Changes	Central Office	IBG	IBG
Print an Employee Navigator Report for OE Changes so CO can Rconcile	IBG	IBG	IBG
Enter All Changes in Payroll, SIS Fin	Central Office	Central Office	CO
New Employee:			
Send New Employee Links to Employee Navigator	Central Office	Central Office	CO
Visit New Employee Orientation to Review Insurance	Central Office	IBG	CO-Linda
Follow-Up on Completion of Forms	Central Office	Central Office	IBG
Print an Employee Navigator Report for New Employee Election			IBG
Enter All Changes in Payroll, SIS Fin	Central Office	Central Office	CO
Year Long Activities:			
Make Changes Outside of Open Enrollment	Central Office	Central Office & IBG	CO-Linda
Enter All Changes in Blues Enroll and Guardian, EN	IBG	IBG	IBG
Enter All Changes in Payroll, SIS Fin	Central Office	Central Office	CO
Retiree, COBRA ACH Collections for Premiums	Central Office	Central Office	Undecided
Compile Beneficiary Changes	Central Office	IBG	CO
Answer Emails and Phone Questions	Central Office	Central Office & IBG	CO
Set up UMB Health Savings Accounts	IBG	IBG	BCBS-email IBG with problems
Send Out Medicare Part D Notices	Central Office	Central Office	CO
Send out COBRA Letters In a timely manner and Maintain Files	Central Office	Central Office	IBG
Help Employees File Disability Claims, Submit to Guardian	Central Office	Central Office	CO
Cancel STD Waiver of Premium When Claim is Complete	Central Office	Central Office	Guardian
Possible Direct Bill for ancillary products	Central Office	Central Office	Undecided
Track and Utilize Wellness Fund Dollars	Central Office	Central Office	CO

Sedalia School District Benefits Insurance Timeline and Responsibilities

Task	2019	2020	2021
Prepare and Distribute Funds for Death Claims	Central Office	Central Office	CO
Address Changes from SIS to EN	Central Office	Central Office	CO
Health Fair:			
Set Health Fair Date, Time, Location Notify Building	Central Office	Central Office	CO-Linda
Coordinate screening details with BCBS	Central Office	Central Office	CO-Linda
Invite Community Vendors	Central Office	Central Office	IBG
Organize and Dispense Incentives	Central Office	Central Office	CO-Linda
Coordinate Health Challenges and Activities with Employees	Central Office	Central Office	CO-Linda
ACA:			
Payroll Tracks Employee Hours for Compliance	Central Office	Central Office	CO-Linda
Set Up ACA in SIS Fin	Central Office	Central Office	CO-Linda
Maintain a List of New Hire and Term Dates for ACA	Central Office	Central Office	CO-Linda
Enter New Coverage, Terms and Retirees for the Year into SIS	Central Office	Central Office	CO-Linda
Submitt Final Report to IRS	Central Office	Central Office	CO-Linda
Send out 1095's to Employees	Central Office	Central Office	CO-Linda
Cost of 1095 Forms and Envelopes	Central Office	Central Office	CO-Linda
Employee Assistance Program:			
Answer Emails and Phone Questions from Employees	Central Office	Central Office	CO-Linda
Monthly EAP Emails to All Staff	Central Office	Central Office	CO-Linda
Distribute Informational Materials and Emails Throughout the Year	Central Office	Central Office	CO-Linda

Whose responsibility is it to distribute and how will it be distributed:

CHIPA (annually)- Add to Employee Navigator during Open Enrollment

Add to EN during OE

FMLA (hire)-We have posters up, do we need to notify employees annually or just time of hire? If just time of hire please add notice to Employee Navigator during sign up

Add to EN during New Hire Sign Up

Health Exchange Notice- Do we need to notify employees annually or just time of hire? If just time of hire please add notice to Employee Navigator. Does this notice need to be presented to employees who are part-time and don't qualify for health insurance?

Add to EN during New Hire Sign Up

HIPAA (annual-website)- What medical topics should SSD address and when should we refer employees to IBG or BCBS. Should we add the HIPPA Notice to Employee Navigator?

Add to EN OE and New Hire Sign Up

Nondiscrimination Notice (hire)- Please add to Employee Navigator

Add to EN during New Hire Sign Up

Special Enrollment Notice (hire)- Please add to Employee Navigator

Per IBG, Ignore

QMSCO (hire)- Add to Employee Navigator

Per IBG, Ignore

USERRA (annually-hire)- Add to Employee Navigator during OE and Hire

Add to EN OE and New Hire Sign Up

Wellness Plans as Group Health Plans (GHPS)- biometric screenings, cancer screenings by Bothwell, does the provider of those services distribute program notices.

Per IBG BCBS does this

COBRA (hire-termination)- Add COBRA information to Employee Navigator during sign up. Send COBRA letter when terminating.

Add to EN during New Hire Sign Up

Summary of Benefits and Coverage- Now, electronically during open enrollment. Do we need to add to Employee Navigator at time of hire?

Add to EN OE

Sedalia School District #200
REQUEST FOR BENEFIT BROKER QUALIFICATIONS

Date Issued: August 28, 2020

Due Date and Time: September 30, 2020 11:00 AM

Return To: Bob Charlesworth, CPCU, ARM, ALCM, AIS
Charlesworth Consulting, LLC
bcharlesworth@charlesworthconsulting.com
Cell: 816-807-9378

This is an invitation to submit request for benefit broker qualifications described herein. Proposals shall be submitted before the due date and time in ELECTRONIC FORMAT ONLY with the RFQ title clearly marked on the reference line. In the event it should be necessary to revise the RFQ, notice will be given in writing to all businesses/individuals who received the original RFQ.

ELECTRONIC COPIES OF PROPOSALS MUST BE RECEIVED IN THE "IN BOX" OF CHARLESWORTH CONSULTING BY THE DUE DATE AND TIME.

The Sedalia School District #200 in Missouri has contracted with Charlesworth Consulting, LLC, to facilitate the District's broker evaluation that handles the District's group Health, Dental, Life, Vision and other Voluntary benefit programs. Current brokerage services are provided by Assured Partners/Insurance and Benefits Group.

The Benefit plans operated on a July 1 Renewal Date for rates/final enrollment.

The District is NOT asking you to evaluate insurance programs but provide information to the District to evaluate brokerage service providers.

With Charlesworth Consulting, LLC handling this actual marketing of the benefit programs for the District on an objective basis, Charlesworth Consulting, LLC and any of their affiliate firms are prevented from quoting this service request.

PURPOSE

The purpose of this RFQ is to solicit professional benefit brokerage services for the District's employee benefit insurance coverage should a change be made away from the incumbent program offered by BlueKC on the Health benefit program, and Guardian for all others as outlined herein. Important dates:

- August 28, 2020 – Charlesworth to issue formal RFQ; District to publicly advertise this request.
- September 11, 2020 – by 2:00 P.M. CT, formal notice of interest to be received by Charlesworth. Any interest received after that date will not be considered.
- September 30, 2020 – Response to RFQ to be received by Charlesworth – electronic copy only.
- October 21, 2020 – Proposing firm requested to reserve for on-site interviews at the District's administrative office in Sedalia, MO is so elected by the District.
- November 10, 2020 – Charlesworth and District Staff presenting to the District's Board of Education the benefit broker information for consideration.
- January 1, 2021 – Appointment of a Broker of Record and service agreement with the selected broker begins.

The District is soliciting competitive information for qualifications to perform benefit brokerage and consulting services related to the design, implementation, maintenance, communication and improvements of the District's employee benefit program.

GENERAL CONDITIONS

1. The proposal must be signed by an authorized representative of the respondent and all required information must be provided. The contents of the proposal submitted by the successful respondent of this RFQ will become a part of any contract award.
2. The proposal is to be submitted to CHARLESWORTH prior to the date and time indicated on the cover sheet. The reference line in the proposal email is to be marked "Request for Benefit Broker Qualifications – Sedalia School District #200". All proposals received by the date and time indicated will be formally accepted for consideration.
3. Proposals received after the date and time indicated on the cover sheet will not be considered.
4. All proposals submitted shall be binding upon the respondent if accepted by the District within ninety (90) calendar days of the proposal submission date.
5. The District reserves the right to negotiate any and all elements of the proposal from the selected respondent.

6. The District reserves the right to reject any or all proposals; to waive any minor informality or irregularity in any proposal; and to make award to the respondent deemed to be the most advantageous to the District.
7. The proposing firm must be currently licensed as a benefit broker/consultant in Missouri; maintain a regional staff that can be “on-site” multiple times per year for consultation, enrollment, board presentations, etc.; and have direct experience with public schools and such statutory requirements in the State of Missouri.
8. The respondent and/or accepted broker is prohibited from assigning, transferring, conveying, subletting or otherwise disposing of this proposal and/or subsequent agreement, or its rights, title or interest therein or its power to execute such agreement to any other person, company or corporation without the previous written consent of the District.
9. The accepted broker agrees to hold and save the District harmless from any and all claims, settlements and judgments for personal injury, bodily injury, property damage and/or death arising out of the consultant's agents, servants and/or employee's negligent acts and/or failure to act, in the performance of the agreement.
10. The District will not be responsible for any expenses incurred by a respondent in preparing and/or submitting a proposal.
11. No respondent on this request shall in any way, directly or indirectly, discriminate against any person because of age, race, color, handicap, gender, national origin or religious creed. In addition, the offeror agrees to comply with the Fair Labor Standard Act, Fair Employment Practices, Equal Employment Opportunity Act, Americans with Disabilities Act and all other applicable federal and state laws, regulations and executive orders.
12. Enrollment in the Federal Work Authorization Program (E-Verify): Bidders are informed that pursuant to Section 285.530, RSMo, as a condition of the award of any contract in excess of five thousand dollars (\$5,000.00), the successful bidder shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection to the contracted services. Successful bidders shall also sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection to the contracted services.
13. Any contractual agreements will be governed according to the laws of the State of Missouri.

14. The District reserves the right to officially modify or cancel the RFQ after issuance. Any such modification will be made by written addendum only, a copy(s) of which must be submitted with the offeror's proposal.
15. No respondent shall give, loan, sell or trade anything of any value to any employee or officer of the District in an attempt to gain favorable acceptance of its proposal. Any actual or perceived conflict of interest MUST be clearly outlined in the proposal. The District has a strict conflict of interest policy.
16. Any exceptions which the respondent may take to the RFQ shall be clearly set forth in their proposal. All features and conditions wherein the offering is unlike the RFP shall be fully explained. A value adjustment to the fee shall be included in the proposal should the District accept the exception.
17. All proposals will constitute an irrevocable offer to perform services as proposed for a period of 90 days and may be accepted by the District any time within 90 days from the date of the opening of the proposals.

CURRENT BENEFIT PROGRAM SUMMARY

The following is a policy summary listing of the various programs offered by the District:

<i>DISTRICT PROVIDED PLANS</i>	<i>ESTIMATED ANNUAL PREMIUM</i>
• <i>2019 – 2020 Base Plan – BlueKC</i>	\$ 4,160,000
• <i>2019-2020 HSA Plan – BlueKC</i>	\$ 1,450,000
• <i>Guardian Long Term Disability (Dist. Paid)</i>	\$ 10,500
• <i>Guardian Basic Life (District Paid)</i>	\$11,250
• <i>Guardian A.D.&D. (District Paid)</i>	\$ 3,250
<i>VOLUNTARY PLANS</i>	<i>ESTIMATED ANNUAL PREMIUM</i>
• <i>Guardian Base and Buy-Up Dental Plans</i>	\$ 172,500
• <i>Guardian Accident Plan</i>	\$ 6,500
• <i>Guardian Short-Term Disability:</i>	\$ 19,460
• <i>Guardian Voluntary Life:</i>	\$ 66,470
• <i>Guardian A.D.&D.:</i>	\$ 4,100
• <i>Guardian Cancer Advantage and Premier Plans</i>	\$ 15,000
• <i>Guardian Vision Plan</i>	\$ 76,600

Also attached are the current Guardian 2020 Rates.

The BlueKC programs are fully insured on a Maximum Refund contract basis with a pooling level of \$100,000. The 7/1/2019 inception saw an 11.4% increase in rates; 7/1/2020 a 4% blended rate increase inclusive of Fees and Taxes.

Estimated health plan enrollment is as follows:

CONTRACTS	BLUEKC BASE	BLUEKC H.S.A.
- <i>Employee:</i>	414	169
- <i>EE & Spouse:</i>	12	2
- <i>EE & Child (ren):</i>	64	36
- <i>Family:</i>	4	0
Total Contracts:	494	207
Total Members:	644	280

SCOPE OF SERVICES / GENERAL QUESTIONS

It is requested that all respondent information be provided in as brief response as possible.

1. Provide a brief history of your firm, including office location that is being proposed to service this District as a single source service provider. A regional office with significant executive authority is considered extremely important to the District. Identify the individual with the local executive authority.
2. Customer Service – Identify key personnel who will be involved with the District including the individual that would present information to Administrative Staff as well as the Board of Education.
 - a. What specific experience does this individual have with local public entities as well as working directly with senior administrative staff?
 - b. How many clients is this person directly responsible for currently?
3. Customer Service - Identify ONE designated regional/local customer service representative that will assist the DISTRICT in its day-to-day benefit plan issues.
 - a. What specific experience does this individual have with public entities (preferably public schools) as well as working directly with Human Resources and Benefits Departments?
 - b. How many entities is this person directly responsible for currently?
 - c. Will this individual be the key when it comes to employee communication ideas, enrollment process, renewal negotiations, etc.?
 - d. Can the District make changes should the assigned representative not appear to work out with District personnel?
4. Strategy/Culture – How do you approach development of a long-term strategy for your public entities? Do you offer a periodic renewal projection, monthly claim information updates, mid-year stewardship summaries to outline the benefit industry trends, etc.?
5. Strategy/Culture – How would you measure the outcome of the District’s strategic plan?

6. Procurement – How does your team advocate for the District with the vendors to ensure the District get the best rates and stay on or under budget, especially at time of renewal?
7. Clinical – Provide measurable examples of creative/innovative ways you have improved the health of other public entity’s employee populations that may work with the District.
8. Communication – How does your team assist in developing employee communication and related tools? Please provide a sample copy of employee benefit communication materials. Identify if your firm will be providing 700 copies of printed summary documents as well as on-line available information/benefit guide tools. Identify if a separate cost would be incurred by the District for any of the communication services outlined.
9. Communication - What types of communication strategies can your organization provide to engage District employees, educate their families and drive action? Would you provide any new teacher educational meetings? Would your firm have a person assigned to assist in providing Retiree Presentations with perhaps a Medicare Specialist and educating those retirees on plan options void of making it a “sales pitch”?
10. Communication – does your firm provide any training, seminars, workshops or on-line resources that can be provided the District’s staff at no additional charge? Highlight just a few examples/concepts of recent trends/ideas.
11. Enrollment Services - With your experience with an account the size of the District:
 - a) What is your involvement to be during the annual open enrollment process?
 - b) Typically, how many of your employees do you anticipate providing at enrollment meetings compared to the number of individuals sent by the insurer?
 - c) Confirm you will commit to a minimum of annual meetings to assist with open enrollment and that the normal timeframe during the Month of May is open for your on-site assistance.
 - d) The District does anticipate the Broker/Consultant to provide alternative face-to-face meetings during the open enrollment, new employee orientation meetings the beginning of each year and perhaps employee enrollment changes throughout the year – confirm this is part of your core services or if this is delegated to the insurers.
 - e) The District would like to have an on-line New Hire Orientation & Enrollment video or other on-line material – confirm what will be included in your proposed services and any associated fees.
12. Briefly identify no more than two possible solutions for an electronic enrollment platform for which you have specific experience in working with clients with multiple facilities and product selections.

- a) Will the anticipated proposed enrollment system include Employee Changes, Qualifying Events all through ONE system coordinating with all current carriers?
 - b) Will the anticipated proposed system be compatible with the District's SIS Financial Accounting <https://www.tylertech.com/> payroll system?
 - c) Please identify the frequency of file transfers for enrollment information and changes?
 - d) Will this system be able to provide the detailed employee and benefit coverage information?
 - e) What would be the anticipated annual fee for this service?
 - f) Is this program directly tied to the continuation of the proposing broker or is it broker agnostic? Be specific.
 - g) Provide a sample termination provision of a possible solution including if the information is considered proprietary.
13. Briefly identify one possible solution which you have direct experience for managing COBRA and Retiree communication and billing. Note any anticipated annual fees for these services and if it is part of the above enrollment system outlined.
14. Financials – Provide specific examples (perhaps 2) of innovative ways your firm has successfully provided financial savings for a group the size of the District? Would you assist the District in evaluating employee contribution strategies?
15. Financials – What resources do you use to analyze medical and pharmacy claims for a group the size of the District?
16. Compliance – Do you have in-house benefits attorney? Recognizing that they cannot represent the District directly, what role do you see this service providing the District?
17. Compliance – Outline the specific services you would provide for ACA questions; 1094/1095 forms; IRS 740 Form information; GASB annual reviews, etc. Note if additional fees would apply for any of these ancillary services.
18. Fee's – How would you prefer to be compensated for our business? The current BlueKC Commission structure is 1% percentage built into the health program, plus BlueKC Administrative Fees. All others are standard commission – would this be acceptable for a mid-year takeover and, at renewal, would these commission structures change? Final fees may be negotiated during finalist interviews with the selected Broker/Consultant as clarification may be made during the interview process (which may be via teleconference), that may impact fees and how compensation may be provided.

19. With the District fully insured with BlueKC, it may be very important to the overall cost the impact of being a BlueChip or similar designation regarding acceptance of Administrative Fees (to be fully disclosed) and how those fee's may impact a lower commission amount built into the fully insured rates or allocated for other non-broker services. Identify such fees.
20. Describe any other facets of your organization and your firm's experience that are relevant to this proposal that have not been previously described.
21. In 200 words or less, answer why the District should select your firm as its benefit broker/consultant by using two specific objective reasons.
22. Insurer Relations: Please provide the insurers for which your firm has placed business in the geographic area of Sedalia, MO. Make special note if you have any public entity business with that firm.
23. Insurer Options: Based on the service area and your experience, what other alternative insurers (key lines of coverage) have you seen success within the last year that the District should be aware?
24. Is the proposing firm able to work with other outside vendors on voluntary benefit programs that may have electronic enrollment/consolidated billing services? Examples could be with American Fidelity, Aflac, Colonial, etc. or others?
25. Current client references – please provide information and contact for up to three current clients for which you serve.

FINAL EVALUATION AND SELECTION

Based on a review of the written response, the District will select a discretionary list of candidates who will be asked to make an oral presentation to be arranged at a mutually convenient time or a phone conference to expedite the process due to social distancing guidelines. This presentation is expected to confirm proposal representations; supplement information obtained through the proposal process and give the District the opportunity to meet/interact with the individuals who would be assigned to the District's account.

Each selected finalist will be evaluated with consideration given to how they best meet the needs of the District and the basis of capabilities described in their written proposal and oral presentation / discussion. The organization that best matches the District's objectives will be recommended to the Board of Education for selection.

Rating Criteria:

- a) Quality & experience of similar services provided for other SIMILAR entities in the District's geographic area the size and/or complexity of this District;

- b) Firm Personnel from a single source (background; experience; in-house staff; etc.), including the ability of the key contact and internal support staff – both clerical and professional in a local/regional office. This includes positive interaction between the District’s staff and assigned personnel of the proposing Broker – daily service issues, enrollment system issues and claim advocacy needs.
- c) Enrollment capabilities, on-site enrollment assistance, benefits administration technology, and/or communication tools that may be provided or for which your firm has access;
- d) Current working experience including needs projections and interaction with overall employee benefits;
- e) Proposed scope of services in compliance with that requested;
- f) Stability of proposing broker of requested services;
- g) Access to the insurance markets or other risk transfer programs on a competitive basis;
- h) Ability to help guide the District to be ahead of cost and benefit issues as well as wellness initiatives when working with carrier services;
- i) Technical capabilities and resources of the broker itself as well as with support providers, especially as it relates to the ACA;
- j) Ancillary services provided by the Broker/Consultant;
- k) Overall creativity and quality of the responsiveness to this RFQ and;
- l) Cost and fees may be fully negotiated by the District with the preferred vendor prior to any recommendation being made that may be beyond standard commissions.

Basis for Award: Information and/or factors gathered during interviews, negotiations, professional news articles and reference checks, in addition to the evaluation criteria contained herein, and any other information or factors deemed relevant by the District, shall be utilized in the final award.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
GENERAL SCOPE OF SERVICES					
1. Brief History:	Founded 65 years ago; August 2015 part of Assured Partners	Locally owned and operated in Leawood, KS for more than 25 years;	50 years in KC area; 1997 CIBZ acquired RD O'Byrne;	Founded in 1994 on customer centric principal; 11/2018 part of Brown & Brown working autonomously.	Founded in 1966 by Jack Lockton; 1987 expanded to benefits and financial services.
	Assured HQ in Lake Mary, FL; 38 offices in States; average 15 year tenure; \$1.58B revenue	HQ in Leawood with offices in Columbia, MO and Denver, CO. 200 professionals; 1600 clients nationwide	450 associates in KCMO. 1,900 across the country. 70 team members on EB .	National now with 700 EE's	Worlds largest privately owned broker; 60,000 clients; 8,000 associates, 100+ offices worldwide. KC is HQ.
Regional office with significant executive authority important: Identify who has local executive authority:	Randy Russell - Sedalia / Warrensburg - has local executive authority	Owner and Founder Mike Bukaty.	Polly Thomas is President of EB of KC and Denver.	Kevin Schaffer (20 yrs) is President of KC office and part of B&B leadership.	Matt Tritz is VP/Producer with Tracy Musolf as Senior VP.
2. Identify key personnel involved with Administrative staff and Board of Education; specific experience with public entities.	Randy Russell, President; 30 years and will present to BOE. Brendan Hurly manages 8 clients as benefit consultant; Cathy Tague - 20 years experience; works with public entities; directly responsible for 8 clients. Skye Pierce support and has 4 years experience managing 6 clients. Cheryl Trelow is HR Specialist.	Scott Hefner, EVP - since 1998, ensuring clients needs are met and Health Care Reform expert and handle renewal negotiations. Jeff Walstrom is Benefits consultant (20 years) with 14 years working with schools in MO and work on enrollment process.	David Johnson (26 yrs) responsible for overseeing performance of team, executing strategy's, reviewing financials, etc.; Jim Vigliaturo (30 yrs) co-team leader; Allison Elliot, assist with marketing, admin and communication; Kristen Walker, back-up for needs and solutions. Dave Coleman for Analytics; Judy Wood on Claims; Abby Stevenson for Wellness.	Dan Hohenberger is Senior Consultant to address strategies, financial objectives, etc. (20 yrs was with Coventry); Nick White is client advocate (8 yrs);with Jane Dahmen will be administrative support and day-to-day (25 yrs); Kelly Schloegel on health strategies; and other for communication and pharmacy.	TBD will be District team member. List Ervin Holland as Sr. Account Manger; Taylor Wehrwein as Account Administrator; Todd Hlasney as Risk Solutions and others for government relations, HR and actuarial.
3. Day to Day Customer Service Representative; experience with public entities, how many clients assigned, changes if necessary?	Cathy Tague - 20 years experience; works with public entities; directly responsible for 8 clients including the District, City of Sedalia, Pettis County, Warrensburg Schools and Bothwell Regional.	Kendra Cusick is Account Manager (2018 at Bukaty) for day-to-day issues, claims, billing, also works with Knob Knoster. She works with 30 groups.	Kristin Grace - Account Exec (20 yrs) for client meetings, day-to-day contact, plan designs and wellness solutions. Handles 12 clients and has worked with Center, Belton, Independence and Raymore-Peculiar schools.	Dan will be responsible for ensuring Hays' day-to-day clients service meets and exceeds expectations. Includes Louisburg, Basehor-Linwood, Leavenworth, Osawatomie and others.	Erin Holland will be the Sedalia Schools District designated customer service representative. Works with 5 other metro schools and a total of 9 clients. Primary lead on majority of insurance needs and engaging other consultants as necessary in specialized areas.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
4. How do you approach development of long-term strategy for public entities? Renewal projections, summaries, trends, etc.	Benefit strategy with the District's culture, wellness, claims data, plan design, consumerism, employee communication, funding, compliance, etc.	5-phase approach to include a Needs Assessment; Marketing; Analysis and Plan Recommendations; Implementation and Ongoing Superior Service.	Develop a 3-5 year strategy, focus to align benefits with goals, legislative mandates, best pricing and employee satisfaction.	Every year, coordinate strategy meeting to learn about District goals and objectives. Coordinate vendor discussions, negotiate renewal rates, assist in employee communications. 3-year rolling strategy works well.	Total rewards optimization and multiyear health planning are cornerstones. 3-5 year achievable. Semi-annual plan cost projections, plan design and employee contribution modeling; predictive modeling.
	Offer renewal projections with monthly claims; thorough review of documents and historical data. Build a profile of current plan and changes. Strive to obtain as much from carriers to limit District's involvement. Keep District aligned with goals.	Need to know the fundamentals and develop long-range strategies; market on fully insured and self-funded format; review data and overall plan effectiveness; help manage the employee life cycle - new, ongoing and former.	Set short-term & long term objectives and utilize the School District benchmarking tool to help attract/retain talent.	Project planning detail; Internal & External resources established; Present & Evaluate alternative plan strategies; Presentation to decision makers. Have cost projections and review data monthly.	Will meet to establish goals, identify market trends and opportunities, quarterly meeting to review financial results and vendor performance, identify gaps in care and improving medical outcomes. Creates IDEAL profile for corporate objectives.
5. How to measure the outcome of District's strategic plan?	Ability to benchmark with similar entities. Trend care gap index scores and a preventive care compliance with predictive models.	After analyzing data and problem areas, address issues. Alternative Modeling to help "try out" design alternatives and possible impact.	Conduct annual performance review after the close of the prior plan year to measure effectiveness, process improvement. Use data to measure outcomes of the plan prior to annual review.	Monthly reporting on plan performance; Health Plan Intelligence (HPI) is data warehouse on 1,400 Hays clients.	Develop key performance indicators. In-house actuary analysis to review areas to reduce cost; assist in rate setting, stop loss levels and health reform.
6. How does your team advocate for District with vendors to ensure best rates.	Aside from identifying trends within claims and leveraging data, use benchmarking data as plan designs, contributions, funding, enrollment, wellness, disease management ancillary benefits, etc. Use PWC, AP's book, Kaiser, etc.	Markets plan with other carriers annually, not necessarily with the intent to move, but to negotiate with the incumbent carriers to confirm we have the best rates possible.	Uses renewal process (analysis if goals and us mathematical approach for renewal negotiations); Negotiation power; Financial Reports (monthly, quarterly, semi-annual) and year end historical. Monthly dashboards. Use a reporting tool by a certified actuary.	KC office employs 8 medical underwriters - have prior experience for insurance companies and have aggressive negotiations. Advance modeling helps develop a forecast to discuss in pricing negotiations.	Senior level consultants always involved; completely vendor neutral; direct access to expert resources; monitor established metrics for client delivery and negotiate performance guarantees and pricing.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
7. Provide measurable examples of creative/ innovative ways you have improved health of other public entity populations that may work with the District.	Employee Wellness Fairs (invite outside organizations); Weight Watchers (have done at no cost to EE); Gym Memberships (leverage deals); Wellness technology like Liivongo for diabetic claims, etc.; Mental Health solutions with EAP's and Mindful with BlueKC	Can assist: conduct employee HRA; prepare wellness plan, Flu shot clinics; coordinate onsite health fairs, biometric screenings; wellness communication; arrange off-site wellness educators. Analyze screening reports to determine needs, etc.	Build a Client Profile to assist a client with implementing an onsite health center for employees, outlining challenges, possible outcomes, etc.	Developed a strategy of integrating analytical and resources with healthcare professionals on wellness. Strategic plan on wellness, utilization and data analysis, vendor activities and assist in implementing strategies.	Primary purpose to help clients improve health and productivity. Risk Solutions team review data analytics, best-in-class vendors; implement solutions and evaluate financial and behavior improvements. Use InfoLock data analytics for data-driven decisions.
8. Employee communications and tools; ability to provide 700 copies as well as on-line benefit guide tools; identify cost.	Work with carriers to provide enrollment and communication materials as well as online resources. Willing to provide 700 copies; Benefit summaries loaded in the online benefit admin/Employee Navigator. No added cost.	Robust on-line enrollment tool includes document library, onboarding, paid-time-off requests and ACA reporting. Bukaty's tool houses enrolment in single, secure system. Full presentation of Employee Navigator will be demonstrated if a finalist. Smaller packet is printed is provided at no cost to district. Other may involve a cost.	Use technology resources to track user engagement. Custom online communication enrollment guide, include videos about benefits, carrier links; booklets are one-stop shop for info. Can provide printed copies. Online distribution with FlippingBook; year round campaign on education.	Kelsey Huber will be communication specialist. Will print 700 copies, online communication tools, including flipbooks; benefit guides, compensation statements, employee meetings and surveys, etc. Also communication brochure; videos, monthly newsletters, etc.	Help implement a communication plan to meet goals; identify specific audience, message and media. Includes face-to-face, printed, online and audio/video. Trend is moving toward electronic and mobile communications and can offer several communication tools based on established partnerships.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
9. Types of communication strategies your organization provides to engage employees and educate families	Offer benefit fairs with brings employees and families to meet insurers; enrollment booklets that also include info on how to find providers,	Ideally onsite meetings with staff to conduct enrollment	Yes - see below.	In addition to #8, have Brainshark Videos that include eLearning;	Will have a dedicated benefit communication specialist at no cost. Provide ALL on-site benefit communication.
New Teacher Educational Meetings:	Will provide, well versed in new enrollment of benefits offered.	Able to provide via Zoom or Microsoft Teams if unable due to COVID.	CBIZ would provide new teacher and retiree presentations with in-house communication practice.	Benefit announcements - create postcards, stuffers, etc.; Monthly newsletters - Live Well, Work Well.	Lockton has built a medical plan cost calculator to customize plans an included in fee.
Retiree Presentations:	Have a Medicare specialist on the team, make them aware of multiple options as general education for avenues after retirement.	Have salaried Medicare specialist that can assist retirees in enrolling in Medicare.	Use Andy Burnham, Medicare specialist for one-on-one consultation and group presentations. No cost to District.	Didn't specifically respond to this question.	Can provide Medicare specialist as often as necessary at no added cost.
10. Any training, seminars, workshops or on-line resources that can provide District staff at no added charge? Highlight a few examples.	Can accommodate compliance training, ACA best practices, insurance education, benefit administration or other general benefit info. Have Compliance Dashboard and Employee Navigator Demonstrations as well.	Hold Better Your Business Seminar and Webinars throughout the year. Offer Business and Legal resources through Randy Woehl. Director of HR.	ThinkHR is an online portal with 200 trainings of compliance-related courses. CBIZ webinars - monthly series open to all clients for CE on HR professionals. COVID-19 Resources; BizTips podcasts.	Provide both webinars and live seminars on healthcare reform, HIPAA, FMLA, etc. Provide notice checklists. Also have Benefits 101 training. No charge for clients to attend.	Includes conferences, seminars, webcasts, blogs, podcasts and white papers. Keeping Clients Informed.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
11 - Enrollment Services a) What is involvement in annual open enrollment process:	Facilitate open enrollment 120 days out and make arrangements with District to conduct to meet goals. Able to visit schools to facilitate. Preferred is one-on-one education with employees. With local representation, can accommodate District quickly.	Scott and Jeff take a hands on approach and involved in entire process.	Experience with public entities. Experience with over 20 different administration solutions. Have the skill to help District select, implement and manage the best partner. CBIZ scripts presentation to ensure consistent message. Coordinate enrollment with vendors.	Coordinate all aspects of annual enrollment. Includes attendance and manage carrier representation. Also provide custom PPT/Video with guides, etc. Have internal production team. Prepared to host virtual as well and live sessions for Q&A. Leverage worksite (voluntary benefits) to fund enrollment costs.	Will coordinate with carrier partners, prepare all materials, present on site or virtual. Will work to develop annual communication plan that includes open enrollment. Usually more than one audience requiring different messages, etc. Lockton to assist in determining forms best suited to District. Open enrollment guides have 10 templates, Brainshark, etc.
b) Typically, how many employees does the Broker send?	Have 3 account executives manage this process from broker level. Task is not delegated to carriers.	Generally send 2-4 employees depending on the number of locations and days to conduct enrollment meetings.	Will ensure at least 1, more often 2, qualified specialists will be at each enrollment meeting.	Work with District to find best approach based on changes to current benefit plan.	An appropriate number to cover any necessary meetings. Possibly open enrollment specialist, carrier support based on number of EE's.
c) Confirm you will commit to minimum of open enrollment meetings during the Month of May.	Yes - confirmed	Will commit to necessary number or meetings.	Confirmed.	Confirmed	Confirmed.
d) District does anticipate face-to-face meetings during open enrollment and new employee orientation each year.	Confirmed to be part of core services	Send out enrollment team early in the school years, normally on in-service days before classes.	Confirmed, multiple options when it comes to virtual software.	Confirmed	Confirmed - also offer via Brainshark info to disseminate large amounts of info.
e) On-Line New Hire Orientation & Enrollment video or other on-line material.	Currently in the process of recording video content for each insurance line offered employees (attached to Employee Navigator). No fee for this service.	Record Voiceover Presentations that can be used for New Hires and Prospective Employees. Also able to do Zoom/Team Meetings.	Confirmed - Explainer and How-To Videos with Flip, with 50 English/Spanish explainer videos; Open enrollment resource center	Enrollment communication included.	Include standard communications (10 templates), electronic guides, enrollment PPT, one open enrollment online presentation, employee satisfaction. Enhanced would be added fee (E-guides, decision tools, Brainshark, texting, etc.).

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
12 - Two possible solutions for an electronic enrollment platform which you are specific experience:	Employee Navigator	Primarily use Employee Navigator for nearly all public schools. Allows staff to check documents, etc., 24/7/365.	Consider Benefits Direct and Explain My Benefits and a few others. Found to be solutions for other Districts.	Primary is Bswift and PlanSource. Vetting, selection and implement is challenging and EB Tech helps this process.	HR Tech Practice can assist with an online enrollment solution. Remain neutral and not owned such. Two to consider would be PWS and bSwift. Needs analysis and pricing analysis.
a) Anticipated enrollment system:	Yes, can accommodate tasks requested. Onboarded 5/2020	Yes, carriers accept EDI.	Yes.	Yes, both will handles as one point of entry and integrate EDI feeds with all carriers.	Yes.
b) Compatible with District's SIS system - TylerTech:	Per Lisa at Tyler Teach, no direct feeds accepted through the SISFin system. Allow for manual excel spreadsheet uploads.	EN has capability to connect with various providers. Can put in touch with Tyler Teck to see if interest on their end.	Any system collectively decide to use will be compatible - has experience with enrollment systems at other clients that use SSIFIN.	Both can integrate with the District's payroll system.	Will require the chosen system to be compatible if possible.
c) Frequency of file transfers	Can be imported as often as preferred	EDI fees occur weekly.	Depend on solution, ensure frequency fits District needs.	EDI fees for both are weekly.	Based on needs analysis
d) Able to provide detailed employee and benefit coverage information:	Yes, already available to District staff.	Yes, comprehensive reporting is available for drill down.	Yes.	Both provide detailed info for plan products.	Yes.
e) Anticipated Annual Fee:	Included as Core Service no additional charge	Offered at no cost if enrollment team is allowed to offer Voluntary worksite benefits. Revenue is used to compensate enrollment team and cover expenses of software.	Around \$2 to \$3 PEPM. Cost may be eliminated depending on the choices made by the District.	Based on 700 plan participants, approx. \$3 pepm. If add ACA reporting, add \$0.50PEPM. Hays would fund these fees directional through BlueKC Admin Fees and worksite commissions.	Third-Party providers typically charge \$3-\$5PEPM. Lockton would seek to understand leverage insurers could subsidize the system.
f) Is this directly tied to continuation of broker / broker agnostic?	Directly ties to IBG services and build on IBG license. Non-Transferrable.	EN software is tied to brokerage relationship between Bukaty and Sedalia Schools.	Not be tied to CBIZ.	Not ties to Hays as broker, thus District will not lose any content. District would assume fees for such services.	Broker agnostic
g) Sample termination:	90 days prior approval. Could run a report to extract info; then EN deletes and no longer assessable.	Info inside EN is the District's, would allow District to run reports for a period of time, but software will no transfer to new consultant.	Upon award, CBIZ would determine such provision.	Both systems not proprietary for Hays, need to visit with each entity.	Remain involved in contract negotiations to secure termination provision to meet needs of District.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
13. COBRA and Retiree communication and billing:	Currently administer COBRA at no added cost including initial rights of notification, qualifying event, record keeping.	NueSynergy is our provider for COBRA. They charge \$1 per month per enrolled in health insurance with a \$5 per event fees.	Offer communication material to Retiree and COBRA participants as part of communication services.	A few COBRA vendors include Discovery Benefit, Taben Group, PlanSource, Ameriflex, Optum, Infinitysource and P&A Group.	Oversee 25+COBRA and retiree programs. Review as part of service and will include both in comprehensive scope of services at included in fee.
	Retirees are currently on the District's bill, but can change to direct bill if District chooses.	Also able to provide retiree billings. Bukaty does work with current carrier that also does retiree billing.	CBIZ does have in-house COBRA, Flex and Payroll Administration services, but would come as separate fee.	PlanSource can integrate the COBRA/Retiree billing with admin system.	
14. Examples the broker has successfully provided financial savings to a group the size of the District.	Negotiation of contracts that provide reimbursement when claims are favorable (BlueKC Max Refund). Negotiated this at no cost to District.	Successfully offered savings to client by doing dependent audit to ensure legal dependents on policy.	District had excessive fees, educated on self-funded options with insurance committee; PBM options; market stop loss every few years.	Utilizing data, work with clients to establish actionable deliverable to help control trend. From Risk Pool management, premium equivalents	High-cost claimant and stop loss placement - used Lockton's stop loss specialty and clinical team to mitigate volatility of large claims cost. Also PBM evaluation and analysis.
Would broker assist with employee contribution strategies?	Assess employee contribution by benchmarking with others are doing so District is not at a recruitment disadvantage.	Also do full evaluation on clients pharmacy trend to make sure Rx benefits fit the needs of employees while being financially responsible.	Yes, use in-house actuaries for contribution strategies, plan design with provider networks, care centers, etc. ; Cost containment strategies.	Actuarially aligned premium equivalent rates are part of the discussion, pitfalls of underfunding, inadvertent subsidizing of tiers, migration of split pools.	Lockton provides employee contribution modeling through EDGE benchmarking tool.
15. What resources used to analyze medical and pharmacy claims:	Monthly claim reports for both and trends. Have proprietary software data analytics at no added cost to District. Recommendations given to District to promote wellness based off diagnosis/claim codes.	Dedicated in-house strategic analyst to review utilization and provide meaningful, actionable reports. Also partner with Lewis & Ellis on valuable industry benchmarks. Provide contribution modeling. Monthly summaries and quarterly added info; semi-annual analysis.	Claims Analysis with monthly claims dashboards; Actuarial reporting to identify issues driving plan costs; NavMD for insight for better decisions about managing health with what-if reporting.	Core financial services include extensive analysis, robust reporting and health plan utilization. Data and metric-driven approach for clients. HPI is the tool to help answer questions on cost utilizers, demographics, etc.	Identify cost drivers and trends. Use InfoLock to determine root causes and areas of opportunity. Then pull in Health Risk Solutions to develop target solutions and cost drivers.
16. In-house benefits attorney and their role.	Utilize house council to provide non-binding advise to District regarding ERSIA questions, HR issues, DOL, ACA changes, etc.	Full compliance department and have multiple labor law attorneys as one attorney cannot handle the needs of all our complex clients.	In-house benefits attorney, Karen McLeese; Annual compliance manual; "At Issue and "Benefit Beat" for time sensitive info; ACA support.	Will review District administrative process for compliance & efficiency with the service team and outside attorneys. Did list 5 attorneys for Hays, look to be in Minn.	Have six full-time ERISA attorneys in house. Also includes senior paralegal. Assist on "as needed" basis. Also have Compliance services and Health Reform Advisory. Ed Fensholt and Rory Akers noted.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
17. Specific services you provide for ACA; 1094/1095 forms; IRS 720; GASB reviews, etc. and any added fees.	Offer Compliance Dashboard (provided) to address IRS, CARES Act, and ACA updates. Welcome to contact team to advise.	Mary Amundsen is managing direct and chief compliance officer to keep current on changes. Routinely provides seminars.	As part of scope of service, CBIZ will consult on all services listed.	Able to assist clients in compliance and interpretation of changes, including deadlines.	Willing to consult with their clients and third-party vendors on filings, but do not complete such reports.
	1094/1095 reporting - offer a solution called Answered Answers which costs \$3,500 a year plus mailing fees and take care of reporting requirements	Bukaty does 1095/1095 reporting for almost all of their schools through Employee Navigator. Expense is Efile and Print at \$2.16 per form for all employees.	If District would like CBIZ to handle the actual documents and filings, that would be an additional fee.	Will manage the process of finding a partner for the District to prepare ACA reports, including 1095-C and mandatory tax reports.	Provide compliance calendar and notice matrix on all notices and other tools to ensure compliance. Provide guidance on Form 1095-C and 1094-C.
18. Fees - how compensated:	Prefer on current basis (1% health plus BlueKC Admin Fee).	Familiar with current arrangement and would except (their spelling) the current commission structure.	Agree to the 1% build int health plan plus BlueKC Admin Fees and standard commissions on other plans.	Can be structured as consulting fee or commission or combination. Agree to take over 1% standard commission	Based on understanding of scope of services, will take over management of these programs at current commission levels.
	Willing to work PMPM fees or any combination.		Open to discussion son changing built-in percentage to a lower level developing on services. Reinvest voluntary commissions to enrollment and other services.	Above does not include commissions received from ancillary and worksite benefits.	
19. Blue Chip implication:	A Royal Blue agency and do get administration fees that do not impact rates. Amount was not disclosed.	Blue Chip - do receive and if chosen can provide total revenue.	A Blue Chips broker and eligible for Service Fee; not an additional charge to District. Amount not noted.	Yes, earn \$10.50PEPM and will utilize for additional resources for the District.	Yes, Blue Chip. The amount does not apply toward the District's renewal calculator. Fee not noted.
20. Describe facets of your organization that have not been previously described.	Handled the District for 25+ years; familiar with District's culture, employee base, etc. District generally benchmarks their plans every 3 years with other brokerage houses and have consistent come in as the most competitive option each time.	Bukaty regularly surveys clients to measure level of service. 5-year retention rate is 98%. Organize focus groups to find what we do well and what could be better.	CBIZ can connect with other specializations within the organization - P&C, Payroll, Retirement Plan, Technology Solutions; Executive Recruiting, etc.	Think-HR is a resource for HQ questions/info. Employment Law is working with Foley & Foley provide "on-call" quasi-in-house employment counsel to address day-to-day issues at no cost.	Organize growth (96% client loyalty); Private and independent; Client teams make decisions; Flat organizational structure.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
21. 200 words - why the District should select your firm - 2 specific objective reasons:	Due to longstanding relationship, positioned to continue to offer highest level of consultative excellent, with local service area and personalize service. Familiarly with vast majority of employee based allows them to be a premier partner of the District.	Should select due to understanding of the challenges that MO school districts face. Both Scott and Jeff have worked with schools in NW and West Central MO for the past 20 years. Endorsed by MSTA.	Viewed as strategic and trusted partner and extension of District's team. Have a team structure tend set expectations to be business partners; understand culture of District and use consulting mindset to discover and test new practices. Bring thought leadership and proven solutions.	Hays' people and culture differentiates from other firms. Hays professionals are experienced, intelligent, competitive, and be laser-focused on District. Do what is necessary for District if it makes sense for you and morally & ethically sound.	Approach is simple - three stakeholders: Clients, Associates, and the communities in which we do business. 55-year track record of success built on developing strong relationships and delivering the best service and advice in the market.
	Able to deploy any resources required, due to affiliation with Assured Partners,	One of the largest Health and Welfare brokers in the Midwest, have strong partnerships with all carriers that allow us to secure best rates and superior service to clients.	Experience in working with clients like the District enables both industry expertise and understanding of the industry to bring meaningful solutions.	Proactive counsel and level of accountability. Model has proven impactful.	Clients would say reason they do business with Lockton are based on responsive service, broad scope of service, 100% objective position in the market. Fierce advocates for clients best interests.
22. Insurer relations you have placed in the geographic area:	BlueKC; UnitedHealthcare; National Alliance/BCBSSC; Trustmark, Humana, Aetna	BlueKC, Cigna, Human, UHC, Aetna, Sun Life, Delta Dental, Mutual of Omaha, Guardian, Principal, Ameritas, MetLife, Reliance Standard.	BlueKC, Humana, Delta Dental of MO, Standard, Guardian with others.	Many listed, including BCBS, UHC/UMR, Cigna, Aetna, Humana on the Medical side.	Delta Dental; BCBS; UHC, Cigna and VSP noted. Only recommend carriers with favorable AM Best ratings.
23. What alternative insures have you had success with this last year the District should be aware?	United Healthcare; National Alliance/BCBSSC and Trustmark	Have had success with Cigna, Aetna, Humana and United. For Ancillary, strong relationships with Guardian, MetLife, Mutual of Omaha and Principal.	Team has a lot of success with varying funding arrangements, like Cost Plus or Self-Fundings. Robust communication plan to boost voluntary benefits and compliance.	Not necessarily a carrier for the District to be aware, but rather aware of funding strategies and plan design to control trend. Most likely BCBS is correct place on fully insured basis. Consider alternative funding strategies, unbundled PBM, stop loss contracts, etc.	Total premium worldwide is \$38Billion. Noted top 10 insurance markets by volume - BCBS; Cigna; UHC; Aetna; UMR; Kaiser; Delta; MetLife; SunLife; Unum.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	ASSURED / IBG	BUKATY	CBIZ	HAYS	LOCKTON
24. Able to work with outside vendors on voluntary benefit program that may have electronic enrollment / consolidated billing?	Yes, many carrier partners. Agency normally facilitates these enrollments, however Employee Navigator has the ability to administer consolidated billing at no added cost.	Yes, have capability to work with these vendors, however we have our in-house enrollment system along with carrier partners that provide a better product while offering the online enrollment system at no cost.	Yes - have a full listing in Exhibit E. SO Benefits Direct; Benefit Focus; Cool Creek; Explain My Benefits; UtiliPro; Paylocity; Oncore; Mawell Health noted.	Well versed in voluntary benefits. Enrollment and communication firms can help in the process - administered through enrollment firm and funded with commissions on these products.	Ryan Ball is benefits leader. Use self-service technology (accident, critical Ill, on BenAdmin system). Enrollment firm options to bring 3rd party to enrollment others.
25. Current client references:	Warrensburg R-VI Schools; Dr. Andy Kohl	Henry County (Windsor) Schools; Scott Ireland, Superintendent	Center Schools; Dr. Michael Weishaar, CFO 30+ yrs.	City of Lawrence; Lori Carnahan HR. 8 years	Lawson Schools; Roger Schmitz, Superintendent
	Bothwell Regional Health; Steve Davis (CFO)	Knob Noster Schools; Dr. Jerrod Wheeler, Superintendent	Raytown- Peculiar Schools; Dr. Steve Shelton, Deputy Superintendent (8 years)	Leavenworth Schools; Mike Roth Superintendent; 6 months	Kearney Schools; Jeff Morrison, HR
	City of Sedalia, MO; Kelvin Shaw (City Administrator)	Wellington-Napoleon Schools; Mindy Hampton, Superintendent	Oak Grove Schools; Dr. Bryan Thomsen, Superintendent; 10+ years.	Basehor-Linwood Schools; David Howard, Superintendent; 1 year	Olathe Public schools; Jill Beckman HR (new client)

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
GENERAL SCOPE OF SERVICE				
1. Brief History:	FTJ formed in 1953; manage a statewide health program for MO schools.	The Valentine/P.K.Weis agencies combined in 2004; 64 yrs and 109 yrs in business respectively.	Dates back to 1912; now 100% employee owned. Staff of 55. Looks to be partnering with Keystone Benefits	Began in 1960 for benefit administration for education community.
	HQ in KCMO and employees 300. Privately owned.	Moberly, MO.	Jefferson City, MO (Keystone appears to be St. Louis area)	Local service team in Springfield, MO
Regional office with significant executive authority important: Identify who has local executive authority:	Rick Jones, VP with local executive authority.	David Weis	Jim Neuner, President; 39 years experience	Caleb Wilson is Midwest Regional Manager
2. Identify key personnel involved with Administrative staff and Board of Education; specific experience with public entities.	Partnered with Arnold Insurance Services of Maryville, MO since 2009 to offer products to schools (10 in MO). Don Tatman would be primary consultant for the District. 40 years experience and direct responsibility for 5 clients.	David Weis has 33 years experience specifically providing employee benefits for school districts.; Having 14 schools (K-12) and three community colleges. David handles renewal negotiations.	Stacie Coke - development, 14 years of municipal client experience. Mark Blassie, State VP of Keystone Employee Benefits in MO/IL, 20 years experience to lead benefit consulting on trends, cost controls analyzing data and program development.	Kaitlin Economon (12 yrs) - account development; Risk Scholten - lead account manager and supervisor; Katie Furtick as enrollment coordinator.
3. Day to Day Customer Service Representative; experience with public entities, how many clients assigned, changes if necessary?	Day to day would be Anne Slentz - experience in HR for 20 years; responsible for 13 school districts. Benefit communication, presentations, videos, etc. Randy and Don help with rate negotiations with BCBSKC.	Sara Smothers - 15 years experience with public schools; working the same number of schools as David. Sara handles employee communication ideas and sets up the enrollment process.	Hillary Thompson (Keystone), 20 years experience; works direction with employers and employees to understand complexities; Michelle Smith (Keystone) focus on non-medical lines. Kellie Quinata will assist day-to-day; 16 years experience; 7 accounts	Rick Scholten serve as primary customer service contact; 5th year at AF after spending 11 years in public education. Employee benefit education, enrollment and benefit administration, section 125 education, HDHP implementation and supplemental packages and reimbursement account administration.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
4. How do you approach development of long-term strategy for public entities? Renewal projections, summaries, trends, etc.	Approach on a long term strategy through benchmarking and dialogue with public clients.	Goal is to reduce losses and hold premiums in check. Do this by promoting and incentivizing wellness; educating members on property plan.	Approach to planning, monitoring and communicating with clients. Thought leadership to deliver strategy; Managing healthcare supply chain - know the District and employees.	Holding implementation meetings with key personnel to determine specific needs. Develop strategy for high-level action plans and target workflows.
	Develop a strategic plan - example to hold healthcare cost to a level 2% below trend. Offer monthly renewal projections, claim info and mid-year stewardship report.	Sedalia has disproportionate number in base plan. Getting members to consumer plans is good for member and District. Monitor monthly claims and update school quarterly; Goal to finish 7/1 renewals by February (start in December).	Retaining employees is vital - competitive employee packages. Help find ways to contain or even cut costs. Multi-year plan guide developed - a road map can be aligned with internal budget planning. Harmonize HR and EE benefits in to the conversations.	Medial plan projections, benefit trends, and claims would be the focus of the medical broker or carrier.
5. How to measure the outcome of District's strategic plan?	Use predetermined benchmarks.	Monitor the balance of the plan enrollments and track the losses compared to previous years.	Challenge the status quo and examine emerging tactics - value based primary care; network management; telehealth; transparent pharmacy benefit; advocacy to best care with highest value.	For everything besides the medical plan, look at participation and utilization to measure effectiveness of the plan. Strategies to increase participation.
6. How does your team advocate for District with vendors to ensure best rates.	Don's underwriting experience can talk with carriers on peer to peer basis; Monthly renewal projections used as a basic report to client.	Experience allows them to accurately forecast the renewal. Tolerance for variance between expectations and actual renewal is low. Prepared to get competitive quotes if necessary to keep carrier in line.	"do not market insurance programs, market our clients". Finding markets with best fit; seeing the best client solution. CostLens Benefit Planning and Contribution Strategy for a custom web portal with current plan scenarios.	AF unique business model for variety or products without use of multiple third-party companies. While brokerage service (besides medical), not a broker - benefits administrator that can work with the District to provide solutions. AF General Agency for dental, vision, and group life options.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
7. Provide measurable examples of creative/ innovative ways you have improved health of other public entity populations that may work with the District.	Education is cornerstone of health related initiatives; on-site screening and education sessions. High level health screening and assessment reporting helps set up plans for District. One idea was inclusion of maintenance Rx at no cost to endure compliance and decrease hospitalizations.	State Fair Community College: Less than 5% in their H.S.A. and 25% renewal offer. IN 4 years, able to balance 50% participation. Renewals average 6.3%. Three Rivers CC, 3% in H.S.A. Will increase to 60%. Losses improved each year.	The Cost Containment approach as outlined earlier. Value based primary care, network management (explore a domestic network with Bothwell), telehealth, pharmacy and high value providers.	Several voluntary benefits offer wellness, diagnostic testing or health screenings each year. Also offer wellness devices during open enrollment as a raffle. Can work to create communication plans to encourage staff to get annual screenings.
8. Employee communications and tools; ability to provide 700 copies as well as on-line benefit guide tools; identify cost.	Team will be instrumental in developing and distributing timely communications and materials; no cost for copies or resources. Monthly wellness campaigns, educational material, FTJ uses bSwift online summary plan descriptions and videos.	Provide monthly newsletter that is distributed electronically (sample provided).	Use multiple platforms to take advantage of technology. Three elements: Ease (existing contracts); Selerix or BriteHR Info in proposal. Cost wasn't clear in document (usually paid via ancillary lines - bc addition).	Provide a variety of communication materials and educational tools to ensure EE's prepared for enrollment. Can provide educational videos and benefits website for more interactive approach - customized.

SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
9. Types of communication strategies your organization provides to engage employees and educate families	Benefit guides, info and videos available. Quarterly wellness challenges with member incentives and prizes.	Personally meet with and enroll each member and explain options.	Develop a benefits communication plan with the District. Benefit topics throughout the year.	Help District implement benefit education to learn about their options. Better education leads to higher satisfaction.
New Teacher Educational Meetings:	Can visit with new staff either on site or virtual meetings.	Have an in-person meeting with staff annually.	Effectively communicate with multigenerational workforce.	Assist employers in changing their communication and motivate employees to look at benefits.
Retiree Presentations:	FTJ employees a FT specialist - Bruce Kallmeyer - available for no obligation or charge. On-site group meetings.	Have separate retirees meeting annually. John Cochran is Medicare specialist to go over options available - encourage retiree to seek local agent.	Kristy Schriefer - WD Medicare Specialist - 22 years with 11 individual market. Helping people aging into Medicare.	Retirement typically administered by the medical broker - may be able to assist in some communication.
10. Any training, seminars, workshops or on-line resources that can provide District staff at no added charge? Highlight a few examples.	Recurring monthly wellness email campaign (prizes by District or carrier). HR Payroll communication training for implementation and ongoing. 24/7 access by HR to FTJ Connect online platform and materials.	eService and Excel spreadsheet enrollment training is provided at no added charge. Various on-line seminars and an annual in-person bookkeepers meeting are conducted at no cost.	Use HR360 via Keystone and HR Training tools / videos as well.	Account team can provide local year-round support for HR Staff; assign dedicated contacts for enrollment solutions; Benefit topics provided year round; Retirement Ready seminar to plan and save for retirement.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
11 - Enrollment Services a) What is involvement in annual open enrollment process:	Creating announcement letters, video, distributing benefit summaries, custom benefit booklet, conduct on site enrollment meetings, access to FTJ Connect, educate/enroll COBRA, create reports post enrollment.	100% - handle all aspects of open enrollment.	Various articles on COVID-19 enrolment ; provided a 2021 open enrollment checklist with a sample timeline that would be developed.	Have a thorough process to handle enrollment process from start to finish. Learn details of medical plan and all other coverage offerings; provide communication tools, group meetings and one-on-one guided enrollment meetings.
b) Typically, how many employees does the Broker send?	Develop strategy to handle . 100% of assistance and meetings will be provided by knowledgeable FTJ staff.	Broker for Lincoln County similar to Sedalia Schools; do annual enrolment with 4 professionals from office. Typically do not request company representatives.	The OE team is part of the planning process. If one-on-one are conducted, a benefit consultant can conduct an average of 18 per OE day.	Have 9 salaried, career managers in MO and several more in region to complete enrollment.
c) Confirm you will commit to minimum of open enrollment meetings during the Month of May.	Confirmed, all routine services of FTJ.	Confirmed.	Confirmed.	Confirmed.
d) District does anticipate face-to-face meetings during open enrollment and new employee orientation each year.	Confirmed, all routine services of FTJ.	Part of core services	Not an issue, flexible.	Confirmed. Can assist with new employees throughout the year.
e) On-Line New Hire Orientation & Enrollment video or other on-line material.	Can provide New Hire Orientation and enrollment videos, included at no added fee.	Do provide this at no additional cost.	Not an issue; use tools like Brainshark; Zoom and others to meet desired employee experience.	Confirmed - wide range of educational videos and interactive marketing materials.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
12 - Two possible solutions for an electronic enrollment platform which you are specific experience:	Specific experience with bSwift. Have on staff an experienced payroll administrator.	Digital onboarding: a company based electronic platform. Corporate Benefit Services, KC, enrolled many schools.	All have limitations, primary use the two above to capture open enrollment elections to connect with major carriers.	Utilize own platform - AFenroll - can provide EDI fees to carriers at no additional charges. Option to enroll medical on other platforms, but need to test prior.
a) Anticipated enrollment system:	Yes, can accommodate BCBSKS and Guardian. 10 possible carriers.	Currently utilize employer services for electronic enrollment changes.	Above notes Solerix or BriteHR	Yes - AFenroll
b) Compatible with District's SIS system - Tylertech:	Can provide multiple reports. Not a direct integration with bSwift and SIS. Can facilitate for additional fee.	Yes	Case builders/IT would work directly with payroll to accommodate need. Excel could be extracted for payroll system.	Yes, can provide payroll updated as long as they get payroll spec beforehand to test. Will not charge District if fee from Tyler is reasonable.
c) Frequency of file transfers	Weekly to carriers except prior to renewal.	Real-time system	Since customized; file feeds weekly, but varies on system.	up to District, but typically weekly.
d) Able to provide detailed employee and benefit coverage information:	Yes, including demographic, benefit class, coverage levels, etc.	Yes	Can include detailed information for EE to review and make election.	Yes
e) Anticipated Annual Fee:	With FTJ, no annual fee for this service.	No fee for this service	Work with several carriers to provide at no additional cost; some modules do add cost to be discussed.	Will not charge for the is service, but ask the district's support to help send out communication. Payroll slot for voluntary benefits and sole provider of such options.
f) Is this directly tied to continuation of broker / broker agnostic?	Broker agnostic.	It is not tied to any broker; platform transferable.	Ben admin is choice of District and provided by the broker and built by the brokers' team.	Broker agnostic - however AF must be voluntary benefits provider to utilize platform
g) Sample termination:	90-days is only requirement.	Data is property of company and District; Not retained by broker; Removal by take access away from portal.	Collaborate with district and vendor partner on any termination needed.	Data and enrollment team will work with District to determine best way to return any needed information.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
13. COBRA and Retiree communication and billing:	As a license TPA, able to bill and collect for retirees and COBRA	Communication: have annual retiree meeting to discuss Medicare. Cobra participants encouraged to attend.	BASIC is a TPA that is proprietary that is available. Cost is \$0.65 per insured employee monthly; \$12 for each COBRA takeover.	Typically handled by medical broker. Recommend Allegiance Benefit Plan Managers or SISCO.
	Not available with all carriers and open to discussion.	Billing: Do offer Cobra Admin and billing at \$2.80 per member. Do not do any retiree billing for any schools.	Retiree billing is \$5.50 per retiree (coupons only); Annual fee noted at \$250.	
14. Examples the broker has successfully provided financial savings to a group the size of the District.	Since 2010, have implemented HDHP with employer contributions to H.S.A.'s. Able to assist retirees as they near Medicare age.	Successfully transitioning members to H.S.A. products has been beneficial. Proper education of staff is key.	Appears to be programs for Rx pricing analysis; Freshbenies for providing a utilization dashboard.	Offer many services, including online enrollment, no additional cost. Not tied to any specific broker.
Would broker assist with employee contribution strategies?	Have implemented supplemental Hospital Indemnity coverage to allow clients to move to higher deductibles with contribution savings from \$200-\$300 per employee.	Us the availability of the consortium option as leverage on renewal. Having that option readily available, insures a competitive offer.	Have an excel program built to compare contribution strategies.	Health employees learn to utilize their benefits smarter which over time can lower cost of insurance. Employee contribution are done by medical broker - happy to assist.
15. What resources used to analyze medical and pharmacy claims:	We would use carrier, PBM, and Zywave resources to analyze medical and pharmacy claims.	Monthly premium v. premiums on a rolling 24-month report. Report is broken down into medical, pharmacy, and capitation fees. Monthly large claims reports. Report runs YTD compared to previous 12 months.	Data Analytics with underwriting strategies, funding alternatives, risk sensitivity analysts to reflect risk/cost structure, trend reductions; Benefitmall to negotiate stop loss programs; TPA/PBM options; Valenz claims management system.	n/a - AF is not bidding on the medical portion of this RFQ
16. In-house benefits attorney and their role.	FTJ has in-house attorney ad also Bob West at Haynes Benefits requiring outside legal. Added fees would apply.	Do not have, but utilize Lews Melahan, former director of MO Dept of Insurance for legal advice.	BenComply Benefits Helpline provided is a toll-free tool to help answer questions.	Have in-house attorney who monitors state and federal; can provide legal guidance on new laws and regulations.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
17. Specific services you provide for ACA; 1094/1095 forms; IRS 720; GASB reviews, etc. and any added fees.	Through subscription with HR360, Zywave and counsel able to stay current.	The 1094 and 1095 forms are provided. No additional fees apply.	Use a compliance facts worksheet to outlined rules and penalties;	AFenroll is licensed from Selerix which provides integrated ACA support through the platform - see separate pricing
	For added fee, ACA reports can be completed and filed and notices to employees. Can assist with Form 720 at no added fee. GASB annual outside actuary (Lewis & Ellis) appears as added cost.			Have Compliance Basics SPD Wrap documents to help create SPD in web-based center.
18. Fees - how compensated:	Randy Arnold is a Blue Chip Broker for 31 years.	The structure is acceptable.	Current is acceptable for mid-year takeover.	AF is not bidding on medical portion. Most services at no added costs in exchange for access to offer portfolio of voluntary benefits to employees. Premiums pays claims, admin, salaried managers and commissions to brokers.
	No changes in proposed compensation.		Preferred pricing is PEPM that eliminates fluctuation of policy rate adjustments.	
19. Blue Chip implication:		Do not have any add-on fees for this reduction.	Does not apply to Winter-Dent. Need to gain an understanding regarding such fees.	N/A
20. Describe facets of your organization that have not been previously described.	Because of experience with self-funded multi school plan and standalone with AIS, currently work with over 100 MO schools. MEUHP is largest statewide health plan by number of school districts which provides peer benchmarks,.	Have a team that administers our school business only. Because their sole focus, their knowledge and expertise are unequalled in the industry.	https://youtu.be/e7ilDnP5dCI	Experts in education market, approx. 26- in MO; salaried managers live in MO and provide year-round support; customizable benefits - mostly portable with no rate increase; team will educate each employee on the benefits and services offered.

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
21. 200 words - why the District should select your firm - 2 specific objective reasons:	Don (Sedalia native), has 40 years work-in with schools, significant public experience. Backed by FTJ, with experience with MO schools can create solutions to help meet client's needs.	Experience - have been providing employee benefits to schools in MO over 30 years. Do not have a sales team that disappears. Team 100% involved. Currently serve a school approximate size of Sedalia (Lincoln County) plus 16 additional schools and CC.	https://youtu.be/e7ilDnP5dCI	AF provides a unique model by removing much of the burden of administration of benefits; provide a variety of service at no additional cost to the District
	Understand need to deliver high quality, competitive plans. Includes marketing and member services.	Service: After on board, do not hand out 800 number to call customer service. Personally handle everything from billing to claim disputes.		Allow a broker to focus attention on the medical plan to deliver the best cost and options.
22. Insurer relations you have placed in the geographic area:	All 90 FTJ clients within MEUHP utilize Cigna - includes Johnson County, Sweet Springs, Sherwood, etc.	United Health Care and Unum with State Fare CC and Marshall Schools. Anthem Blue Cross/Blue Shield.	United Healthcare, Anthem/BCBS, Aetna, Principal, KC Life	In addition to AF plan, get quotes from Principal, Delta Dental, Ameritas, EyeMed, Superior Vision, VSP, Mutual of Omaha and Texas Life
23. What alternative insures have you had success with this last year the District should be aware?	Performed marketing effort for Blue Springs Schools and their group life - Hartford now. Have relationships with Ameritas, Delta Dental, VSP, EyeMed, Unum, Hartford, Fidelity Security, Met and Others. Hospital Indemnity underwritten by Fidelity Sec. a sister company to FTJ.	Unite Healthcare; Anthem Blue Cross; Unum; Guardian; Aflac; American Fidelity.	Humana, Trustmark, Guardian, Lincoln, MetLife and WD's Meridian Captive are options for the District.	N/A

**SEDALIA SCHOOL DISTRICT
BENEFIT BROKER SUMMARY 2021 SERVICE INCEPTION**

	FT JONES	WEIS	WINTER DENT	AMERICAN FIDELITY
24. Able to work with outside vendors on voluntary benefit program that may have electronic enrollment / consolidated billing?	Yes, FTJ currently has a partnership with American Fidelity, and long-time producer for Unum/Colonial. AIS distributes AFLAC. Some carriers have systems that can be leveraged if bSwift not used.	Yes	Leverage core vendors offering voluntary and worksite products to deliver educational enrollment experience, new hire onboarding, ongoing education. Expanding vendor options to consider due to pandemic.	AF intends to use full suite of employee benefits to meet needs of District. Expand benefits offered. Typically start by getting previous voluntary benefits to direct bill, then able to get new platform in place.
25. Current client references:	Excelsior Springs Schools; Dr. Jaret Tomlinson	Lincoln County RIII; Dr. Mark Penny	Inter-State Studio (Sedalia); Steve Craighead	Northwest R-1; Geoff Macy
	MEUHP, Ken Cook (ED)	State Fair CC; Rachel Dawson (HR)	Lincoln University; Stephen Minche	Kirksville R-III; AJ Rolston
	Kanas City MO Schools; Linda Quinley, CFO	Western School District; Mike Nagle	Local Election - Washington County; Jeanette Allen	Excelsior Springs; Jaret Tomlinson



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

DATE: December 17, 2020

TO: Lockton

FROM: Dr. Todd Fraley

RE: Broker Interviews

Lockton,

Allow me to take the time to offer my sincere appreciation for your participation and interest in representing our school district. Our interview team, administration, and Board of Education went into this process with an open mind seeking a brokerage firm that would best fit the needs of the Sedalia School District. All four companies that participated in the interview process exhibited the skills and resources needed to meet the district's needs.

The Lockton team made an impressive presentation. The wealth and knowledge, expertise, and extensive resources offered by Lockton create a unique opportunity. These extensive resources and skillsets weighed heavily on the interview committee's decision making. One concern did include how Sedalia might fit into such a large and expansive organization. Being a big little town, our employees seek comfort in relationship and knowing those who provide them service are one in the same as themselves. At this time the district will not be recommending Lockton for its brokerage services. This decision could change in the near future and the district hopes that Lockton would still consider Sedalia as a client at that time.

In true transparency the district has decided to recommend that the incumbent, IBG/Assured Partners, continue to represent the district at this time. This agreement will extend for one year at which time the district will reconsider this recommendation.

Again, thank you for your time and energy during this strenuous process.

Dr. Todd Fraley – Assistant Superintendent



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

DATE: December 17, 2020

TO: Hays

FROM: Dr. Todd Fraley

RE: Broker Interviews

Hays,

Allow me to take the time to offer my sincere appreciation for your participation and interest in representing our school district. Our interview team, administration, and Board of Education went into this process with an open mind seeking a brokerage firm that would best fit the needs of the Sedalia School District. All four companies that participated in the interview process exhibited the skills and resources needed to meet the district's needs.

The committee felt Hays presented the most professional proposal of all four interviewees. The Hays team's attention to detail and dedication to success was clearly evident. All members of the district's team were quite impressed. The district had some concerns as to how Hays might approach our employees in regards to decision making focused on quantitative data. The district feels that a more qualitative and slightly more humanistic approach may better suit our people. At this time the district is choosing not to recommend Hays for broker services, but this may well change in the near future.

In true transparency the district has decided to recommend that the incumbent, IBG/Assured Partners, continue to represent the district at this time. This agreement will extend for one year at which time the district will reconsider this recommendation.

Again, thank you for your time and energy during this strenuous process.

Dr. Todd Fraley – Assistant Superintendent



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

DATE: December 17, 2020

TO: CBIZ

FROM: Dr. Todd Fraley

RE: Broker Interviews

CBIZ,

Allow me to take the time to offer my sincere appreciation for your participation and interest in representing our school district. Our interview team, administration, and Board of Education went into this process with an open mind seeking a brokerage firm that would best fit the needs of the Sedalia School District. All four companies that participated in the interview process exhibited the skills and resources needed to meet the district's needs.

Your attention and dedication to customer service illustrated a level of humanism that show true care and compassion. The interview team felt that this dedication to service represented CBIZ's strongest asset. The concerns of the district concerning CBIZ included whether CBIZ might be over extended with its clientele list. The district also had concerns as to CBIZ's contingency plan should one or more of its representatives leave the organization and whether suitable replacements could fill that gap. The district has decided not to recommend CBIZ for this process, but not inclusively for these reasons of concern.

In true transparency the district has decided to recommend that the incumbent, IBG/Assured Partners, continue to represent the district at this time. This agreement will extend for one year at which time the district will reconsider this recommendation.

Again, thank you for your time and energy during this strenuous process.

Dr. Todd Fraley – Assistant Superintendent



SSD

Sedalia School District #200

4.10

*District Office
2806 Matthew Drive
Sedalia, Missouri
65301-7981
(660) 829-6450
Fax (660) 827-8938
www.sedalia200.org*

Steven G. Triplett, Ed.S
Superintendent

Nancy L. Scott, Ed.D.
Assistant Superintendent
Human Resources
Federal Programs

Todd Fraley, Ed.D.
Assistant Superintendent
Buildings & Grounds
Support Services

Chris Pyle, Ed.S.
Assistant Superintendent
K-12 Special Education

Harriet Wolfe, Ed.D.
Chief Finance Officer

Devon Gilmore, M.E.D.
Director of Curriculum
Instruction & Assessment K-5

Becky Brownfield, Ed.S
Director of Curriculum
Instruction & Assessment 6-12

Bob Satnan, B.A.
Communications Director

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

MEMO

TO: Board of Education; Steve Triplett
FROM: Dr. Fraley
DATE: January 25, 2021
RE: Summer School 2021 and 2020 Financial Review

Please be advised of the following:

- Reading Camp Grades 1-5
July 6 – July 30, 2021 – 8:00 a.m. to 12:00 p.m. (Mon-Fri)
APPLICATIONS WILL BE TAKEN AT THE BUILDING – CAN BE
TAKEN AT CENTRAL OFFICE
- Elementary Enrichment (Math, Reading, Science) Grades 1-5
June 7 – June 25, 2021 – 8:00 a.m. to 12:00 p.m. (Mon-Fri)
- Credit Recovery Grades 9-12 – S-C High School
June 7 – June 25, 2021 – 7:50 a.m. to 12:40 p.m. (two sessions)
Make-up days will be June 24/25, 2021
APPLICATIONS WILL BE TAKEN AT SMITH-COTTON HIGH
SCHOOL ONLY
- High School Academic Online Courses:
Personal Finance/Physical Education/Health
June & July sessions
APPLICATIONS WILL BE TAKEN AT SMITH-COTTON HIGH
SCHOOL
- Student Paid Driver’s Education Program
June & July sessions dependent upon enrollment
APPLICATIONS WILL BE TAKEN AT SCHS OR CENTRAL
OFFICE

If you have any questions, please contact me at 660-829-6456. Thank you.

	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1			SUMMER SCHOOL 2020											
2			PROPOSED FUNDING											
3														
4														
5	A. Foundation Formula Funding:													
6														
7	39,353	contact hours		39,352.9406										
8	1,044	contact hours per ADA			=	37.694388	ADA							
9						X1	Summer School Multiplier							
10						37.6944	Summer School							
11														
12	B. Estimated SS Revenue Calculation													
13	A. SB287 Formula @100% phase-in 2019							=	\$ 161,585.26		per June 2020 WADA payment		(\$4286.7194)	
14	C. Estimated Prop C Revenue							=	\$ 37,808.60		per June 19-20 payment		\$1,003.03	
15														
16	TOTAL FUNDING							=	\$ 199,393.86					
17	FUNDING @ 100%							=	\$ 199,393.86					
18	Driver's Ed Fees								\$ 3,240.00	(Rev Acct 5122)	Prior Year June 2019-20			
19	TOTAL FUNDING								\$ 202,633.86					
20														
21	C. Expenses:													
22	A. Salaries -Teachers, Nurses, Security							=	\$ 138,618.22					
23	B. Benefits							=	\$ 21,869.43					
24	C. Transportation Driver's Ed Brakes							=	\$ 470.00					
25	D. Fuel							=	\$ 261.71	(Driver's Ed Fuel)				
26	E. LAUNCH FEES							=	\$ 51,000.00					
27	F. Driver's Ed Insurance							=	\$ 105.00					
28	G. Supplies							=	\$ 4,919.81					
29														
30	TOTAL EXPENSES							=	\$ 166,244.17					
31														
32	TOTAL ACTUAL FUNDING								\$ 202,633.86					
33	LESS ACTUAL EXPENSES								\$ 166,244.17					
34														
35	DIFFERENCE								\$ 36,389.69					



SEDALIA SCHOOL DISTRICT #200

2806 Matthew Drive, Sedalia, MO 65301-7981 p:660.829.6450 f:660-827-8938

Steven G. Triplett, Ed.S.
Superintendent

Todd Fraley, Ed.D.
Assistant Superintendent

Chris Pyle, Ed.S.
Assistant Superintendent

Jason Curry, Ed.S.
Assistant Superintendent

Devon Gilmore, M.E.D.
Director of K-5 Curriculum
Instruction & Assessment

Becky Brownfield, Ed.S.
Director of 6-12 Curriculum
Instruction & Assessment

Bob Satnan, B.A.
Communications Director

Missouri Model District
www.sedalia200.org

**We Live Tiger
Pride Everyday**

Sedalia #200 is an equal
opportunity and affirmative
action employer

DATE: December 17, 2020

FROM: Dr. Todd Fraley

RE: District Van Purchase

The district seeks to permission to purchase a new 10 passenger van.

State regulations specifically state that schools are only allowed to regularly transport students in a van that is manufactured for no more than 11 passengers including the driver.

Ford is no longer manufacturing 11 passenger vans, but is the only auto maker manufacturing a 10-passenger van at this time.

The district requests that the Board of Education accept the lowest qualified quote from Rick Ball Ford of Sedalia. Rick Ball submitted the only quote for a new 10 passenger all-wheel drive passenger van.

The attached quote is for a fleet price of \$32,998.00.

Memo

To: Board of Education

From: Smith-Cotton CTE Programs

Re: DESE Enhancement Grant

Date: 1/15/21

I have attached our narrative and proposed enhancement grant budget for your review. Mr. Wright will be in attendance to answer any possible questions.

[Wade Norton](#)

Enhancement Grant Request

Overview:

The Smith-Cotton Career and Technology Education departments would like to request approval to submit an Enhancement Grant application to DESE for the 2021-2022 school year. DESE provides reimbursement to career education programs at 75% and 50% rates depending on the items being purchased. This allows districts to invest in instructional equipment at a significant reduction in costs.

The Smith-Cotton PLTW Biomedical Science Department is requesting funds to purchase virtual reality classroom sets. This new equipment will allow students to experience a variety of virtual reality simulations in the medical field. The PLTW Biomedical Department is still researching the technology needed for the classroom. They will be attending an exhibition with a potential vendor along with central office administration this month. The amount budgeted may change after the visit.

The Smith-Cotton PLTW Engineering Department is requesting funds to purchase a 3D printer palette system that allows the user to combine different 3D printer filaments and colors for various 3D printer jobs. This system also cuts down on wasted materials for the 3D printers. The engineering department also needs to purchase additional VEX IQ classroom kits for the recently updated Introduction to Engineering Design curriculum. These classroom sets are required for the course and will be reusable for several years.

The Smith-Cotton Business Department is requesting funds to update the teacher workstations in their computer labs. These computers are 4+ years old and are due for updates. The teacher workstations will be upgraded with dual monitors, stands, graphics cards, and a printer. The business department is also requesting funds to purchase Adobe software licenses for their computer labs. This software is used daily in the labs and needs to be renewed annually.

The Enhancement Grant application is due in February. We are requesting approval to submit the application to DESE. If approved, the district will need to provide the matching funds as shown below:

Total Grant Request: \$94,160

DESE Reimbursement to District: \$68,995

District Match Required: \$25,165

Please see the attached budget spreadsheet for additional information.

2021-2022 Enhancement Grant Budget Request

PLTW Biomedical Science Department						
Course Title	Item	Rationale	Qty.	Price	Total	District Match
Human Body Systems	Virtual Reality Classroom Set	The PLTW biomedical science department would like to provide virtual reality equipment for students to further explore medical simulations. This will be a classroom set that is utilized by all PLTW biomedical courses.	1	\$ 75,000.00	\$ 75,000.00	\$ 18,750.00

PLTW Engineering Department						
Course Title	Item	Rationale	Qty.	Price	Total	District Match
Introduction to Engineering Design	3D Printer Palette System	The PLTW engineering program would like to use this palette system to be able to combine different types of 3D printing materials and colors for various 3D printing projects. It also allows the printers to save on material waste.	1	\$ 900.00	\$ 900.00	\$ 225.00
Introduction to Engineering Design	VEX IED IQ Kits	The Introduction to Engineering Design curriculum has been updated and now requires the use of these new Vex IQ kits. These will be classroom kits utilized by all sections of IED.	48	\$ 245.00	\$ 11,760.00	\$ 2,940.00

Business Department						
Course Title	Item	Rationale	Qty.	Price	Total	District Match
Business Department	Teacher Dual Monitors and Printers	The business department teachers would like to request dual monitors for their desktop computers. These will aid in classroom instruction. This includes dual monitors, stands, graphics cards, and updated classroom printer for three separate classrooms.	1	\$ 3,500.00	\$ 3,500.00	\$ 1,750.00
Graphics/Multimedia/Technology	Adobe Software License	The business department requires Adobe software for digital production courses. This is a site license for the courses to use.	1	\$ 3,000.00	\$ 3,000.00	\$ 1,500.00

Total Grant Expenses	\$	94,160.00
District Match	\$	25,165.00

Pettis County Early Childhood Center
Quarterly Board Report
January 19, 2020

CSIP 1: Student Achievement

125 students have made progress on IEP goals
 65 students have mastered at least one IEP goal

Students were given the Brigance Early Childhood Screen III during the 1st quarter. We will test again in the

CSIP 2: Highly Qualified Staff**Trainings:**

Special Education Training
 How to get along with Difficult People
 Special Education Process
 HighScope
 Visual Thinking Strategies
 Safe Crisis Management Training
 Staff participated in a variety of other training designed for the specific needs of our students, including but not limited to autism, health, and safety.

Observations

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations			9	5	6	5					

CSIP 3: School Environment

We greet each student as they come into the building and classroom. There are daily visits to each classroom.

Drills conducted

Fire Drill: 9/24/20
 Tornado Drill: 9/23/20
 Intruder Drill: 9/17/20

Mr. Dooley is present during the morning arrival, morning dismissal, and afternoon dismissal.

CSIP 4: Family & Community

Family Visits- Via Phone

Visits From:

Fire Department drive by
 CTC students work weekly in the classrooms.
 SFCC Nursing students- Weekly Observation

Developmental screenings are conducted throughout the quarter.

P/T Conferences

October	February	May
<ul style="list-style-type: none">• 186/189 held (98%)		

Home Visits Conducted (via phone)

1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Total
185	30			

2020-2021 Heber Hunt Elementary Board Report

2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

Aimsweb Composite Reading Assessments

	Fall (Established)	Winter (Established)	Spring (Established)
K LNF, LWSF	13%	47%	
First Grade ORF	16%	29%	
Second Grade VOC, RC, ORF	21%	51%	
Third Grade VOC, RC, ORF	54%	58%	
Fourth Grade Voc, SRF, RC, ORF	53%	60%	

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be 90% of a minimum of 90% of students.

Attendance - Percentage of Students Meeting 90% Criteria

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Building Total	-	92.30	93.14	94.12	-	-					

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations	-	20	19	22	11	-					

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted (listed)

Fire; Tornado; Intruder; Earthquake;

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office	-	2	8	21	7	5					
Bus	-	3	0	1	2	0					

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities (listed):

- **PBS Bootcamp**
- **PBS Virtual Assemblies**
- **PBS tier 1 and 2**
- **Winter parties**
- **Weekly Leadership Team Meetings**
- **PTA Meetings**
- **After School Tutoring**
- **Quarterly Data Meetings**
- **Weekly Team and Planning Meetings**
- **Staff Meetings**

Horace Mann Elementary Board Report 2020-21

2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

Aimsweb Composite Reading Assessments

	Fall (Established)	Winter (Established)	Spring (Established)
Kindergarten (LNF/LWSF)	18%	34%	-
First (ORF)	10%	33%	-
Second (VOC/RC/ORF)	33%	43%	-
Third (VOC/RC/ORF)	40%	60%	-
Fourth (VOC/SRF/RC/ORF)	52%	51%	-

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be 90% of a minimum of 90% of students.

Attendance – Percentage of Students Meeting 90% Criteria

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Building Total	0	92%	93%	-	-						

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations	-	22	13	12	11						58

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

- Drills conducted - Fire: 9/15, 11/4**
- Tornado: 9/10**
- Intruder: 8/31, 9/17**
- Bus Evacuation:**

Implementation of SBS (Sedalia Behavior Support for Tiers 1 and 2)

- Behavior continuum**
- Focus on school-wide expectations**
- Recovery Room/Behavior Interventionist**
- Therapy Dog - Toby**
- School Social Worker**
- School Protection Officer on Campus**
- Semi-Annual Safety Check**
- Weekly Playground Inspections**
- Safe Crisis Management Training**
- Monthly Faculty Meetings**
- Departmental Collaboration Meetings**
- Data Team Meetings**
- Math PD**
- Instructional Technology PD**
- Culture and Climate Survey**
- Mental Health Training**
- Horace Mann Leadership Team**
- Move Your Bus Book Study**
- Katy Trail Referrals**
- Accessing Jack's Warehouse**
- Buddy Packs**
- Burrell Services**
- Child Safe**

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office Referral	0	9	10	14	11	-	-	-	-	-	44
Bus Referral	0	0	0	0	0	-	-	-	-	-	0

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Fall Parent/Teacher Conference Attendance Percentage

Kindergarten	98%
First Grade	95%
Second Grade	100%
Third Grade	97%
Fourth Grade	95%
Mixed Age	100%
Building Total	97.5%

- **Parents of only 6 students did not conference with our teachers**
 - Multiple attempts were made to reschedule conferences
- Conferences were offered: in person, phone, virtual, & class Dojo.

Building Activities (listed):

- **Open Enrollment**
- **Kindergarten Screenings**
- **Parent/Teacher Conferences**
- **PTA Monthly Meetings (Virtual)**
- **PTA Fall Party**
- **PTA Winter Party**
- **SBS Quarterly Assembly (Virtual)**
- **Behavior Bash - Quarterly**
 - **Smores & More**
 - **Winter Olympics**
- **Book Fair**
- **Boys and Girls Club**
- **Sedalia School District Foundation membership drive**
- **Helping Hands/Sunshine**
- **Toys for Tots**
- **Nucor adopt a family for Christmas**
- **NJHS Food Baskets**
- **Burrell Services**

Parkview Elementary Board Report 2020-2021

2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

Aimsweb Composite Reading Assessments

	Fall (Established)	Winter (Established)	Spring (Established)
Kindergarten (LNF/LWSF)	15%	45%	
First (ORF)	20%	39%	
Second (VOC/RC/ORF)	28%	57%	
Third (VOC/RC/ORF)	60%	65%	
Fourth (VOC/SRF/RC/ORF)	57%	69%	

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be 90% of a minimum of 90% of students.

Attendance – Percentage of Students Meeting 90% Criteria

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Building Total	-										

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations		10	22	11	16						

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted - Fire: 9/18

Tornado: Practice in class

Intruder: 9/17

Implementation of PBIS Tier 1, Tier 2, and Tier 3

Focus on school-wide expectations

School Social Worker

School Protection Officer on Campus

Semi-Annual Safety Check

Weekly Playground Inspections

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office/Recovery		10	15	10	6						
Bus		11	18	1	3						

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities (listed):

Kindergarten Onsite Fall Experience

Parent/Teacher Conferences

PTA Monthly Meetings

Class Parties

Gardner Denver Awards in Classroom

Petting Zoo K-4

PTA Meetings Monthly

4th grade Virtual Winter Program

Parent/Teacher Conference Attendance Percentage (Multiple attempts will be made to reschedule conferences)

Grade Level	In-Person Conf	Phone/Zoom Conf	Percentage
Kindergarten	70	11	94%
First Grade	69	12	90%
Second Grade	60	29	98%
Third Grade	60	23	95%
Fourth Grade	62	19	95%

Skyline Elementary Board Report 2020-2021 2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

Aimsweb Composite Reading Assessments

	Fall (Established)	Winter (Established)	Spring (Established)
Kindergarten (LNF/LWSF)	17%	47%	
First (ORF)	17%	39%	
Second (VOC/RC/ORF)	38%	58%	
Third (VOC/RC/ORF)	48%	59%	
Fourth (VOC/SRF/RC/ORF)	57%	69%	

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be 90% of a minimum of 90% of students.

Attendance – Percentage of Students Meeting 90% Criteria

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Building Total											

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations	13	22	27	6						

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

- Drills conducted - Fire, Tornado, Intruder**
- Implementation of PBIS Tier 1 and 2**
- School Wide Training in PBIS**
- Daily Virtual Assemblies with focus on school-wide expectations**
- Attendance Incentives**
- School Goal focus - Culture, Mission, Vision**
- Therapy Dog - Stella**
- School Protection Officer on Campus**
- School Social Worker**
- Weekly Playground Inspections**

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office Referrals	0	5	17	11	5						
Bus	2	11	3	14	3						

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities (listed):

- Virtual Open House
- Parent/Teacher Conferences
- PTA Monthly Meetings
- Homecoming Spirit Days
- Virtual Math Night
- Online Book Fair
- Class Parties

Parent Teacher Conference Attendance Percentage (Multiple attempts will be made to reschedule conferences)

Kindergarten	95.2%
First Grade	91.8%
Second Grade	96.2%
Third Grade	90.6%
Fourth Grade	96.75%

2020-2021 Washington Elementary Board Report

2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

Aimsweb Composite Reading Assessments

	Fall (Established)	Winter (Established)	Spring (Established)
K LNF, LWSF	6%	26%	
First Grade ORF	10%	10%	
Second Grade VOC, RC, ORF	23%	33%	
Third Grade VOC, RC, ORF	42%	57%	
Fourth Grade Voc, SRF, RC, ORF	41%	57%	

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be 90% of a minimum of 90% of students.

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations	8	15	5	12						

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted (Listed)

- Fire; 9/14, 11/3, 1/13
- Tornado; Week of 9/18
- Intruder; 9/17
- Earthquake; Oct

Discipline referrals

	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office/Recovery	12	15	5	12						
Bus	0	0	0	0						

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities (listed):

- Virtual Open house
- Math family night (PT conf)
- Sedalia behavior support tier 1 and 2
- Fall parties, & Winter parties
- Parent/Teacher conference
- Monthly Wellness words -children are recognized virtually and through the school
- Connection with Word of Life Church
- Stanley Black & Decker provided activities for class parties

Parent Teacher Conference Attendance Percentage

	Percentage of Parents in Attendance	Number Rescheduled
Kindergarten	100%	
1 st Grade	90%	
2 nd Grade	100%	
3 rd Grade	98%	
4 th Grade	95%	

Sedalia Middle School Board Report 2020-2021

2nd Quarter

CSIP 1: Student Achievement

Objective 2: A minimum of 80% of Sedalia School District #200 students will be reading on grade level or above.

STAR

	Fall (Established)	Winter (Established)	Spring (Established)
5 th Grade	64%	69%	

AIMSWEB - Reading

	Fall (Established)	Winter (Established)	Spring (Established)
Composite	60%	65%	

CSIP 1: Student Achievement

Objective 4: 90% of the students will attend 90% of the time.

Average Daily Attendance

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
NEE Observations		12	14	1	20	8					

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted (listed)

Fire – 9/4/20, 10/1/20, 1/20

Tornado – 9/18/20, 1-20

Intruder – 9/8/20, 9/17/20

Earthquake – 9/17/20

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Office		6	17	8	14	0					
Bus		11	14	10	2	0					

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities (listed):

Employee of the Month

Back Snack Program

SABERS Conducted

Parent Teacher Conferences/ 72% as a building (Fall 2020)

Pumpkin Decorating Contest/P-T Conf.

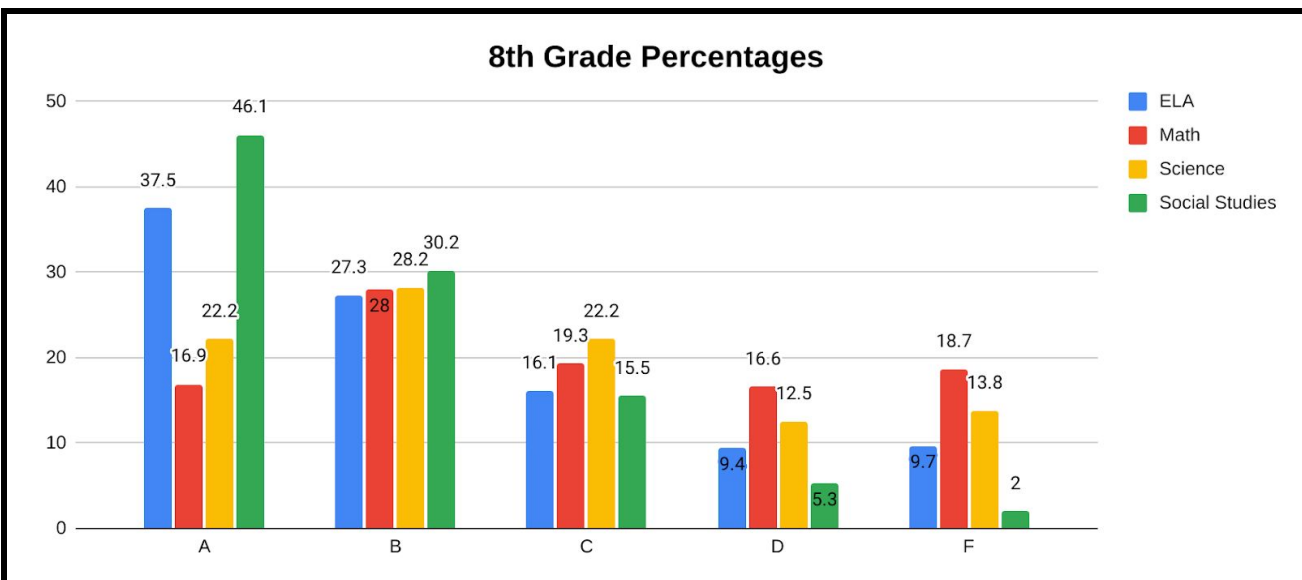
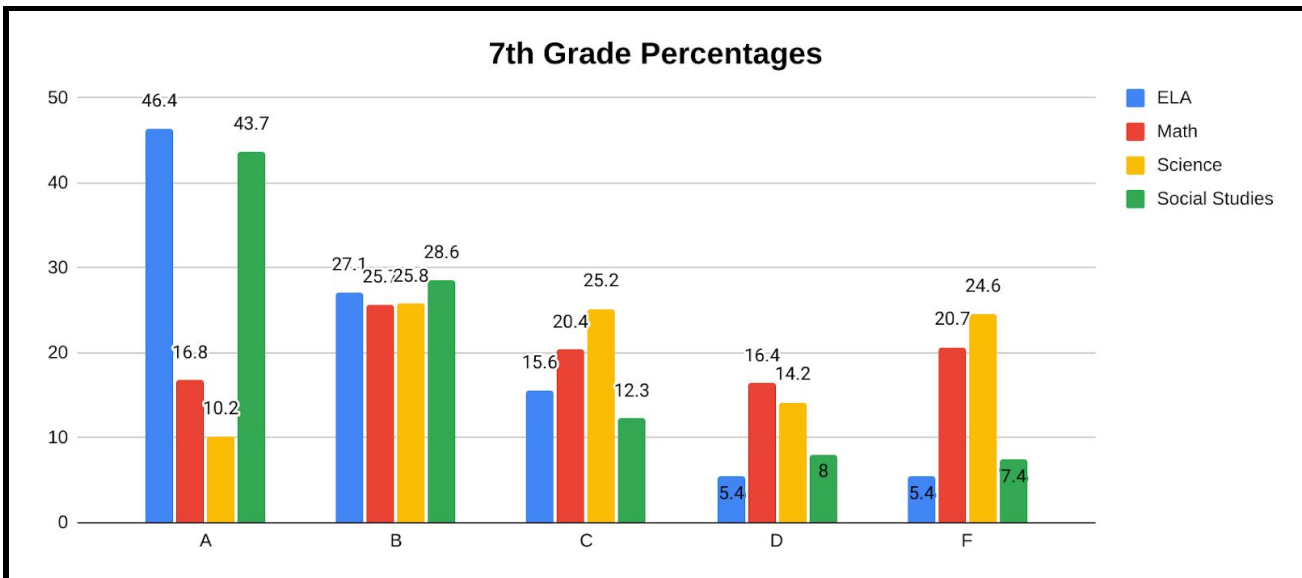
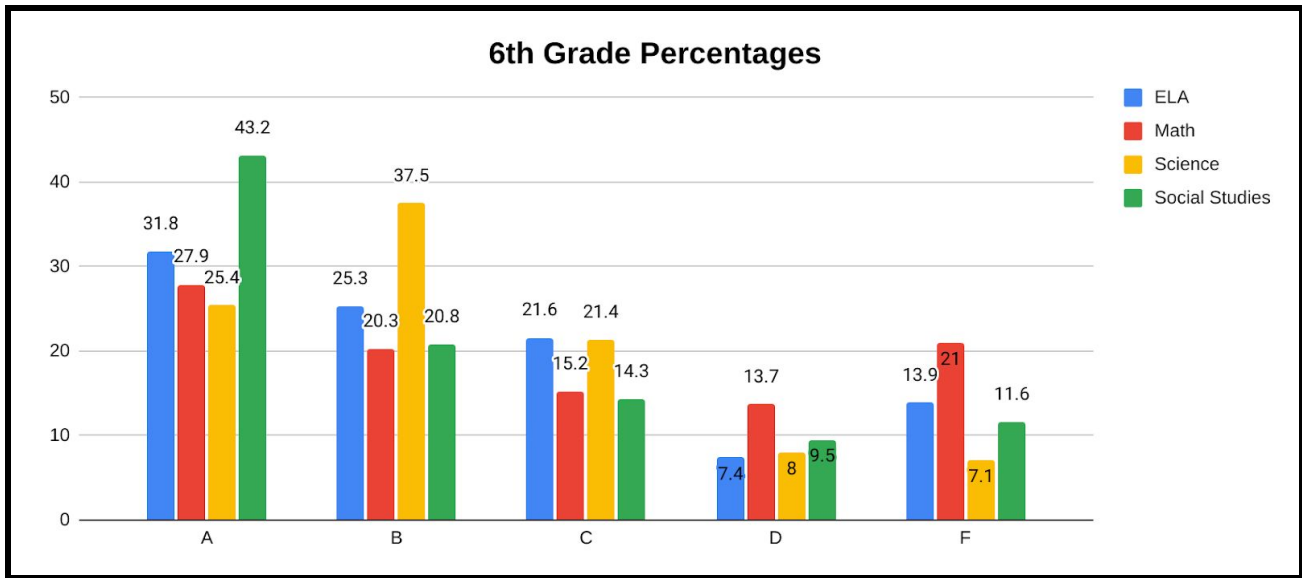
Virtual Building Tour

Various Teams Hosted Virtual Meet & Greet

Smith-Cotton Junior High Board Report

2nd Quarter 2020-21 School Year

CSIP 1: Student Achievement - GRADE DISTRIBUTION 2nd QUARTER



CSIP 1: Student Achievement * date unavailable for current year.

Objective 4: 90% of the students will be at school 90% of the time.

90/90

	YTD as of 9/10/19	YTD as of 10/8/18	YTD as of 11/7/18	YTD as of	YTD as Aof	YTD as of	YTD as of	YTD as of	YTD as of	Total
19-20	92.19	92.38	93.27	93.63						
20-21	N/A	N/A	N/A	N/A						

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Walk-Through	NA	37	57	32	19						

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted (listed)

- **Fire Drills: September 15th, January 13,**
- **Tornado Drill: Due to COVID and the inability to social distance, teachers discuss procedure in classrooms**
- **Intruder Drill: 8/25th (staff only), September 19th (district-wide)**

Discipline referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	Total
Building Total 19-20	5	134	236	189	146	155	155	NA	NA	NA	NA
20-21	—	88	159	143	106						
Bus Total 19-20	2	25	32	13	18	6	18	NA	NA	NA	NA
20-21	1	31	31	30	12						

CSIP 4: Family & Community (Due to Covid-19 we have limited the amount of traffic in the building)

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

- **Created a virtual Veterans Day video to honor veterans and shared across media platforms.**
- **Social Workers/Counselors/Local Church delivered Christmas presents and money for food to local families in need.**
- **STUCO delivered wreaths to Sylvia Thompson**
- **Shared Holiday/Christmas Virtual Performances from music departments.**
- **Continues to post videos, pictures, and building updates using Canvas, Facebook, Instagram, email, etc.**

Smith-Cotton High School Board Report

2nd Quarter 2020-21 School Year

EOC Courses Grade Breakdown

Content	A	B	C	D	F
Biology	55	72	70	59	60
English II	80	68	61	43	35
Algebra I	17	31	49	68	66
Algebra II	51	31	31	28	26
American Government	64	47	30	20	0

CSIP 1: Student Achievement

Objective 4: 90% of the students will attend 90% of the time.

Attendance – Percentage of Students Meeting 90% Criteria

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Percentage of Students	--	--	--	--	--	--				

* Not included in the 2020-2021 report.

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Walk-Through	N/A	33	39	33	21					

(Walk-Through numbers are current as of end of 2nd quarter, 12/18/20)

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

Drills conducted (listed)

Fire Drills: 9/4/20, 1/13/21

Tornado Drills: 9/4/20, 1/13/21 (discussed procedures with all students for each class period. Actual drill not taking place due to COVID-19).

Intruder: 9/4/20, 9/17/20, 12/3/20

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Parent/Teacher Conferences (Both in-person and virtual)
Students of the Month for Rotary
Distinguished Alumni Ceremony
Norton's Notes
Veteran's Day Assembly
Fall Play

Virtual Open House

Winter Vocal/Instrumental Concerts (virtual)

Discipline Referrals

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Building Total 19-20	5	102	156	173	83	57	103	65	--	--
Building Total 20-21	--	59	87	59	36					
Truancy 19-20	0	2	7	6	2	4	9	5	--	--
Truancy 20-21	--	9	10	5	5					
Bus 19-20	0	0	21	12	3	0	2	1	--	--
Bus 20-21	--	8	4	6	2					

Truancy referrals are included in building total numbers. Bus referrals are not included in building total numbers. December numbers are through the end of the quarter, 12/18/20.

Tiger One Card Levels Percentages

White	Black	Gold	Platinum	
Attendance - 89.99% & below	Attendance - 90.00%-92.99%	Attendance - 93.00%-97.99%	Attendance - 98.00%-100%	Continuous
Any grade below a C	No grade below a C	All A's and B's	All A's or A-'s	Non-continuous
2 or more discipline referrals	1 discipline referral	No discipline referrals that result in ISS, OSS	No discipline referrals	Non-continuous
<p>Continuous - Attendance data will be evaluated quarterly, however, the percentage is running total throughout the entire school year.</p> <p>Non-continuous - Grades and discipline referrals will be evaluated quarterly. Grades will reset at semester.</p>				

* Not included in the 2020-2021 report.

1st Quarter:

White -

Black -

Gold -

Platinum -

Whittier High School Board Report

CREDIT DISTRIBUTION

9th Grade

	Com Arts	Math	Science	Social Studies	Non-Core
Day School	NA	NA	NA	NA	NA
Night School	0	0	0	0	1

10th Grade

	Com Arts	Math	Science	Social Studies	Non-Core
Day School	1	3	5	12	4
Night School	NA	NA	NA	NA	NA

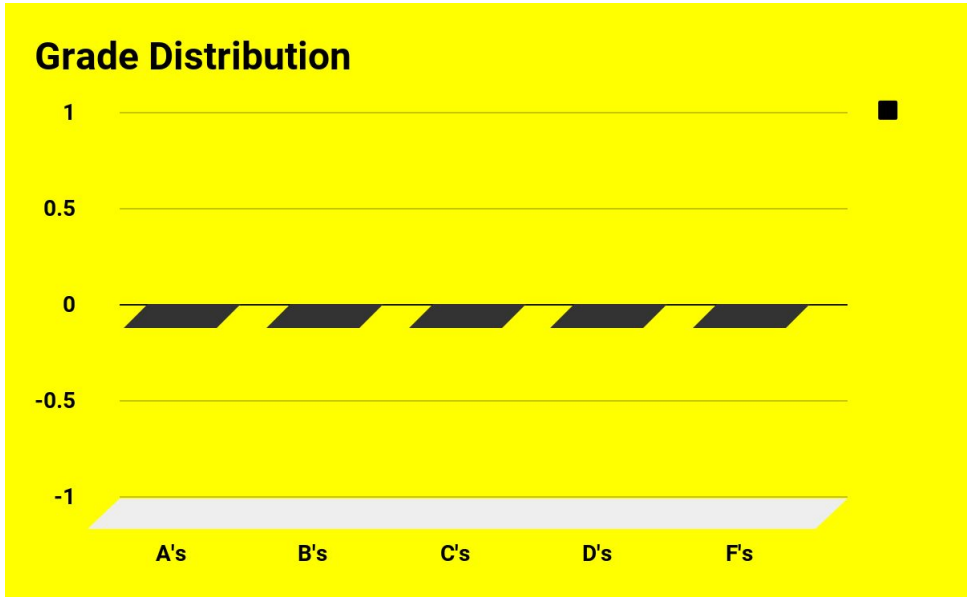
11th Grade

	Com Arts	Math	Science	Social Studies	Non-Core
Day School	8	7	6	12	26
Night School	11	4	3	4	14

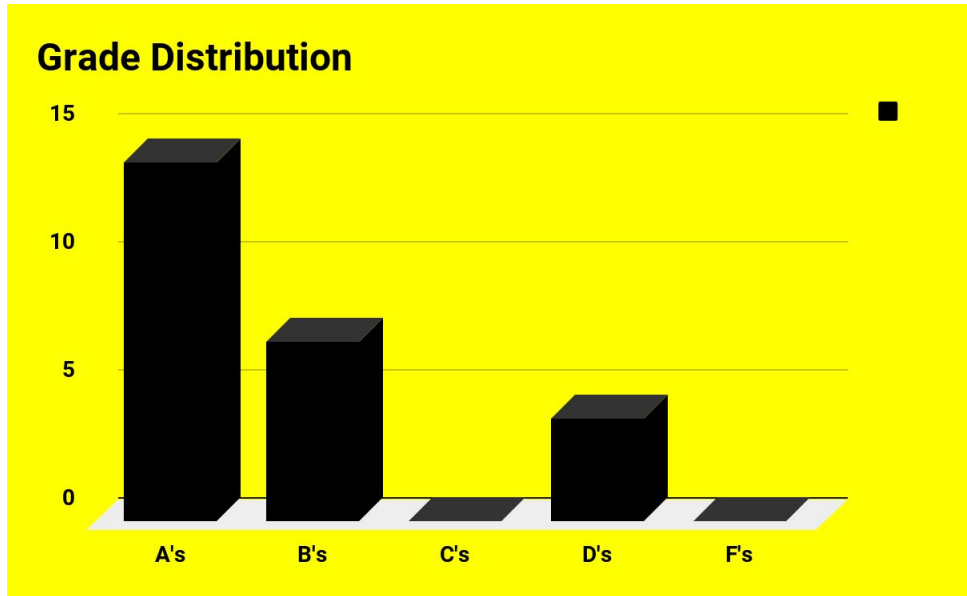
12th Grade

	Com Arts	Math	Science	Social Studies	Non-Core
Day School	19	10	14	10	23
Night School	23	6	4	10	28

GRADE DISTRIBUTION—DAY SCHOOL

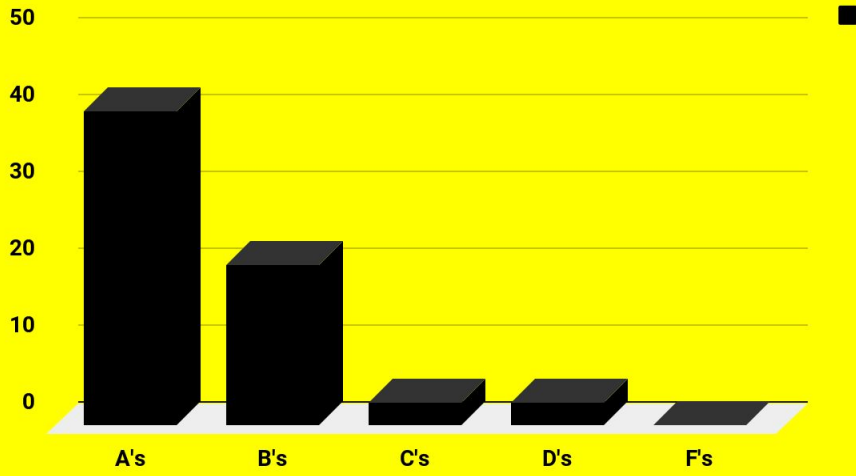


9th Grade



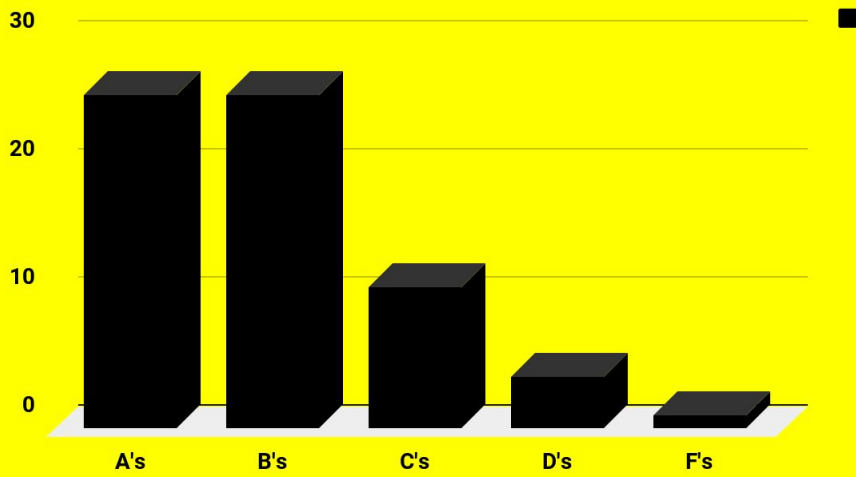
10th Grade

Grade Distribution



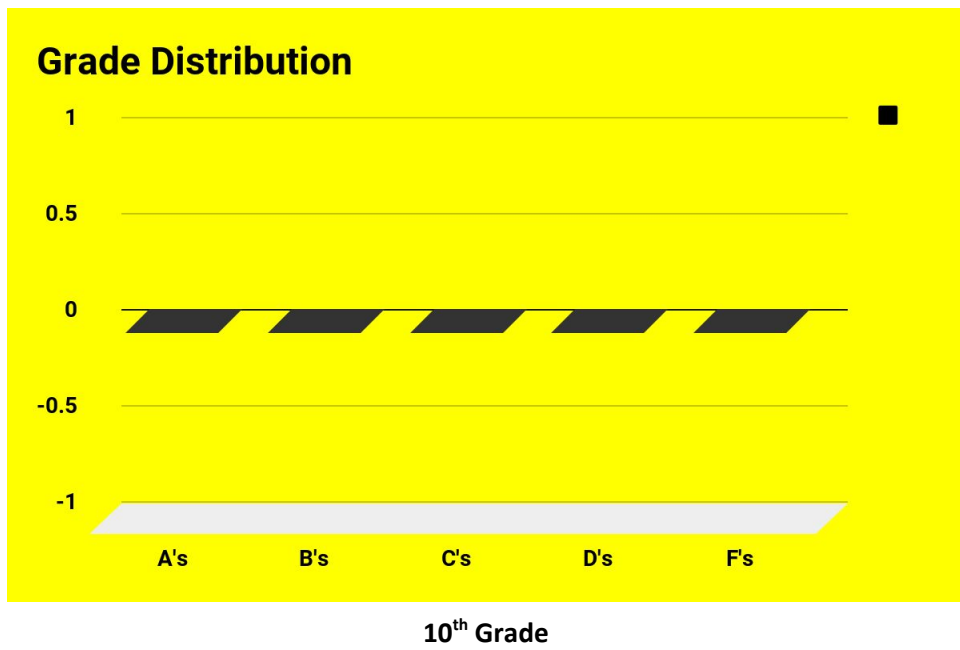
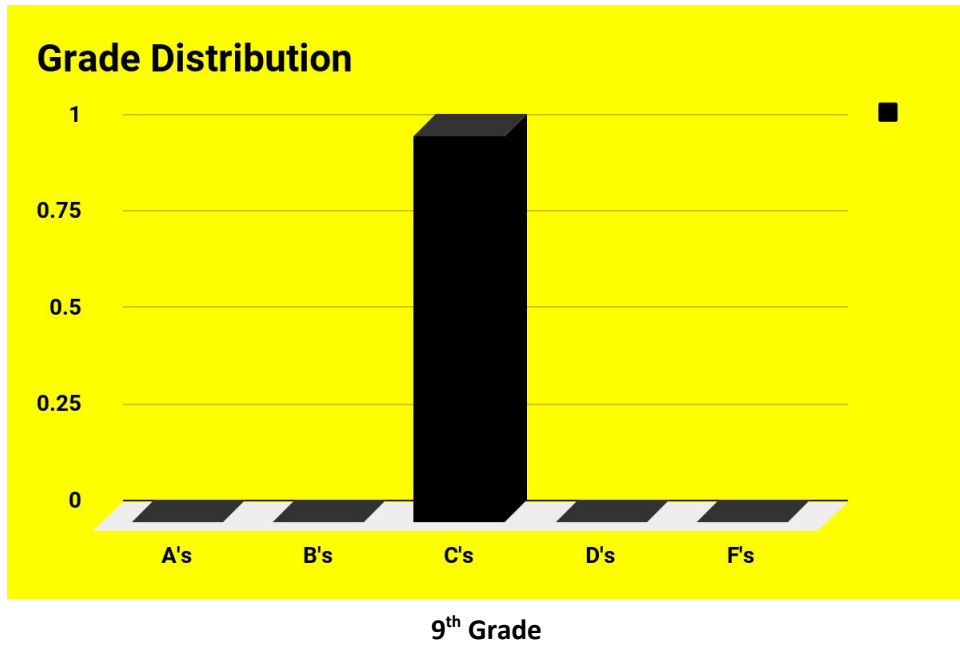
11th Grade

Grade Distribution

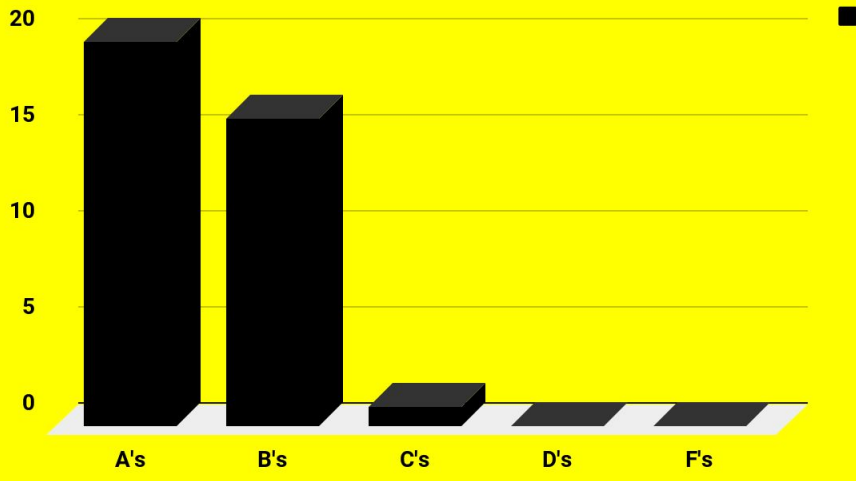


12th Grade

GRADE DISTRIBUTION—NIGHT SCHOOL

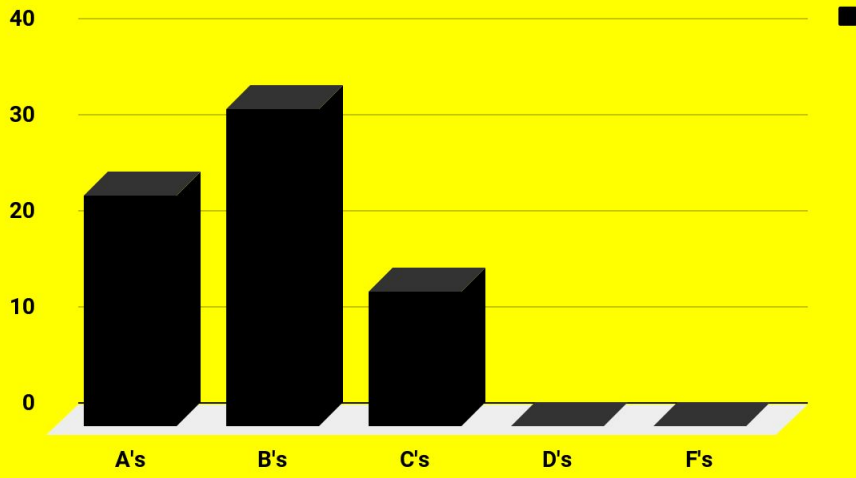


Grade Distribution



11th Grade

Grade Distribution



12th Grade

CSIP 1: Student Achievement

Objective 4: The building and district Average Daily Attendance will be at least 95%.

Average Daily Attendance---Whittier

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Total	NA	89%	95%	98%	95%					

Average – 90/90 Standard 4---- Whittier

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
On Target %	NA	72%	84%	91%	86%					
Year To Date	NA	72%	67%	73%	75%					

CSIP 2: Highly Qualified Staff

Recruit, attract, develop, and retain highly qualified staff to carry out the LEA/District mission, goals, and objectives.

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
NEE Walkthroughs	NA	5	5	5	5					

CSIP 3: School Environment

Provide and maintain appropriate instructional resources, support services, and functional and safe facilities.

- **Fire Drills: September 14th, October 22nd,**
- **Tornado Drill: September 28th**
- **Intruder Training for Staff: August 25th**
- **District Wide Intruder: September 17th,**
- **Earthquake Information: October 15th**

Discipline referrals

Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
NA	3	1	0	0					

CSIP 4: Family & Community

100% of parents and community members will have the opportunity to interact with staff at least three times per year.

Building Activities

1. **Open House(s): Did not have due to COVID**
2. **FaceBook**
3. **Skills Program: Do not have this class due to COVID**
4. **Service Learning: Do not have this class due to COVID**
5. **Fall Parent Teacher Conferences, October 28th and 29th**
6. **SOS--Signs of Suicide Prevention Program--Not done due to August student death.**

Parent Teacher Conference Attendance

Fall

Parents of 6 students were represented during Parent Teacher Conferences.

Spring