

Orange County Educational Arts Academy
A California Public Charter School

BOARD OF DIRECTORS
MEETING MINUTES

Regular Meeting

May 8, 2024

6:00 p.m. – Closed Session

6:30 p.m. – Open Session

OCEAA School Library

825 N Broadway, Santa Ana, CA

Reference Materials: <https://bit.ly/3xZc7Hb>

Zoom Link for Presenters: <https://bit.ly/33DU6Mz>

MINUTES

I. Call to Order: 6:12 PM

A. Roll Call

Board Members

Dr. Alfonso Bustamante

Carmen Aparicio, Chair

Ben Stanphill, Secretary

Jessica Reyes

Dr. Kenia Cueto

Dr. Gregory Barraza

Present

Absent

X

X

X

X-open

X

X

Staff/Other

Dr. Pedro Llorente, School Director

Mike Limon, President/Executive Director

X

X

B. Approval of Agenda

II. Public Comment on Closed Session Items, If Any

Opportunity for members of the public to address the Board on closed session items

III. Adjourn to Closed Session

A. Staff Evaluations/Discipline/Privacy or Other Confidential Issues (Gov. Code Section 54957)

IV. Reconvene to Open Session and Report of Action from Closed Session, If Any

V. Public Comment

Opportunity for members of the public to address the Board on agenda items and/or on non-agenda items during regular meetings only

VI. Review and Approve Deposit of up to \$35,000 for TNT Fireworks Stand

Action: Approve deposit of up to \$35,000 for TNT Fireworks Stand.	Motion: BS Second: JR
	Vote: 4 for 0 against

VII. Board and Staff Reports

A. Operations Report – Dennis Nguyen, CSMC

B. Staff Reports

1. Executive Director – Mike Limon

(a) Draft OCEAA 2024-25 Budget Updates

(b) Draft OCEAA 2024-25 Local Control and Accountability Plan

(LCAP)

2. School Director – Pedro Llorente

C. Board Update

VIII. Items for Consent

Action on the items below will be made in one motion unless removed from Consent by a Board member. Items removed from Consent will be considered in the original agenda order immediately following action on Consent.

A. Approval of Minutes from April 2024 Board Meeting

B. Approve March 2024 Check Register

Action: Approve Consent Items Listed Above	Motion: JR Second: KC
	Vote: 4 for 0 against

IX. Interview and Approve Gregory Barraza, Ph.D. as New Board Member

Action: Approve Gregory Barraza, Ph.D. as new board member.	Motion: BS Second: JR
	Vote: 4 for 0 against

X. Review and Approve 2023-24 OCEAA Wellness Policy

Action: Approve Wellness Policy	Motion: BS Second: KC
	Vote: 5 for 0 against

XI. Review and Approve Form CL 500 Declaration

Action: Approve CL500 Declaration	Motion: BS Second: CA
	Vote: 5 for 0 against

XII. Items for Future Meetings

The next regularly scheduled meeting is on June 12, 2024.

XIII. Adjournment

The meeting was adjourned at 8:49 PM.



Financials through Mar 31, 2024

Monthly Financial Board Report

Prepared for: Orange County Educational Arts Academy

Prepared by School's CSMC SBM - Dennis Nguyen



Financial Summary

Actual to Budget:

This report is as of Mar 31, 2024, compared against our board-approved budget in March 2024, based on 629 students enrolled and 578.7 ADA.

YTD Revenues through **Mar 31, 2024**, are **\$8,695,875** or **13% (\$998,427) over** our current. LCFF is over by \$362k but we are expecting to reduce LCFF due to the prior year correction. All other state revenues are ahead of budget by \$779k due to monthly receipt of ELOP funds for FY23/24. Behind budget are federal (\$133k) and state nutrition (\$10.8k), federal SPED (\$27k), and state SPED (\$52k), primarily due to timing.

YTD Expenses through **Mar 31, 2024**, are **\$8,204,859** or **3% (\$254,851) under** our current budget primarily due to payroll being \$136k less than projected due to several vacant positions. Curriculum is under budget by \$40k along with professional consultants by \$43k. The school is overspent in educational consultants by \$131k, but overall, there are minor overspend/underspend that is keeping the overall budget under spent.

Therefore, net income is **\$491,016**.

Balance Sheet:

As of Mar 31, 2024, we had total cash of \$5,336,270, short-term liabilities of \$3,288,336, and long-term liabilities of \$11,743,266. The ending fund balance is \$2,831,572.

Reconciled cash increased by \$154,740 in the month of March.

Understanding the Financial Health of the Organization

The chart below explains some of the parameters that the school's leadership can evaluate to understand their financial health, and potential areas of weakness.

Cash Ratio

Ability to meet short-term obligations with cash



Current: 162.3 % **Target:** > 100.0 %

Formula:
(Cash) / (Current Liabilities)

Defensive Interval

Months of continued operation without incoming funds



Current: 6.0 **Target:** > 3 months

Formula:
(Cash + Securities + AR)/(Average Expenses for Past 12 Months)

Current Ratio (Liquidity)

Ability to pay short-term obligations




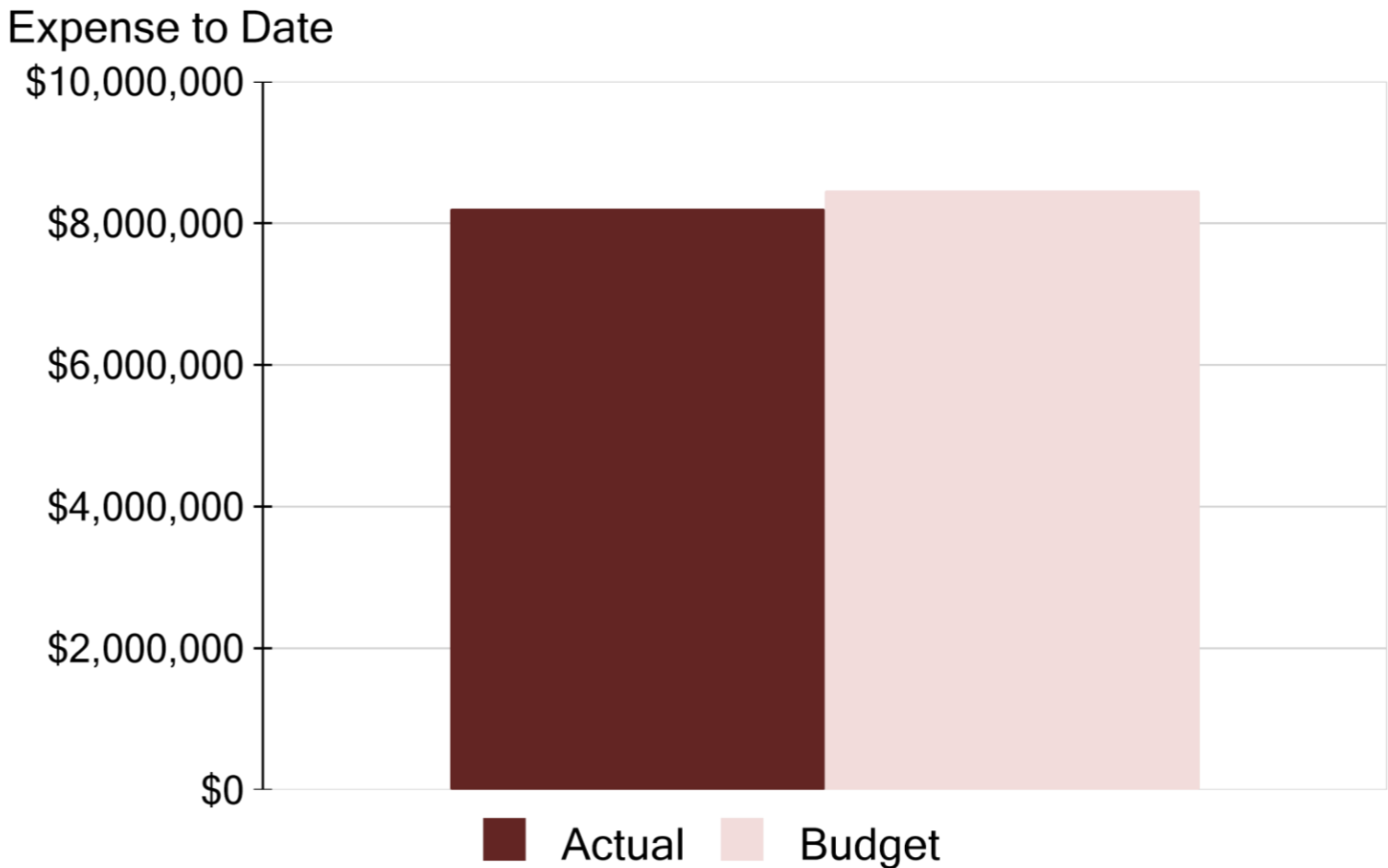
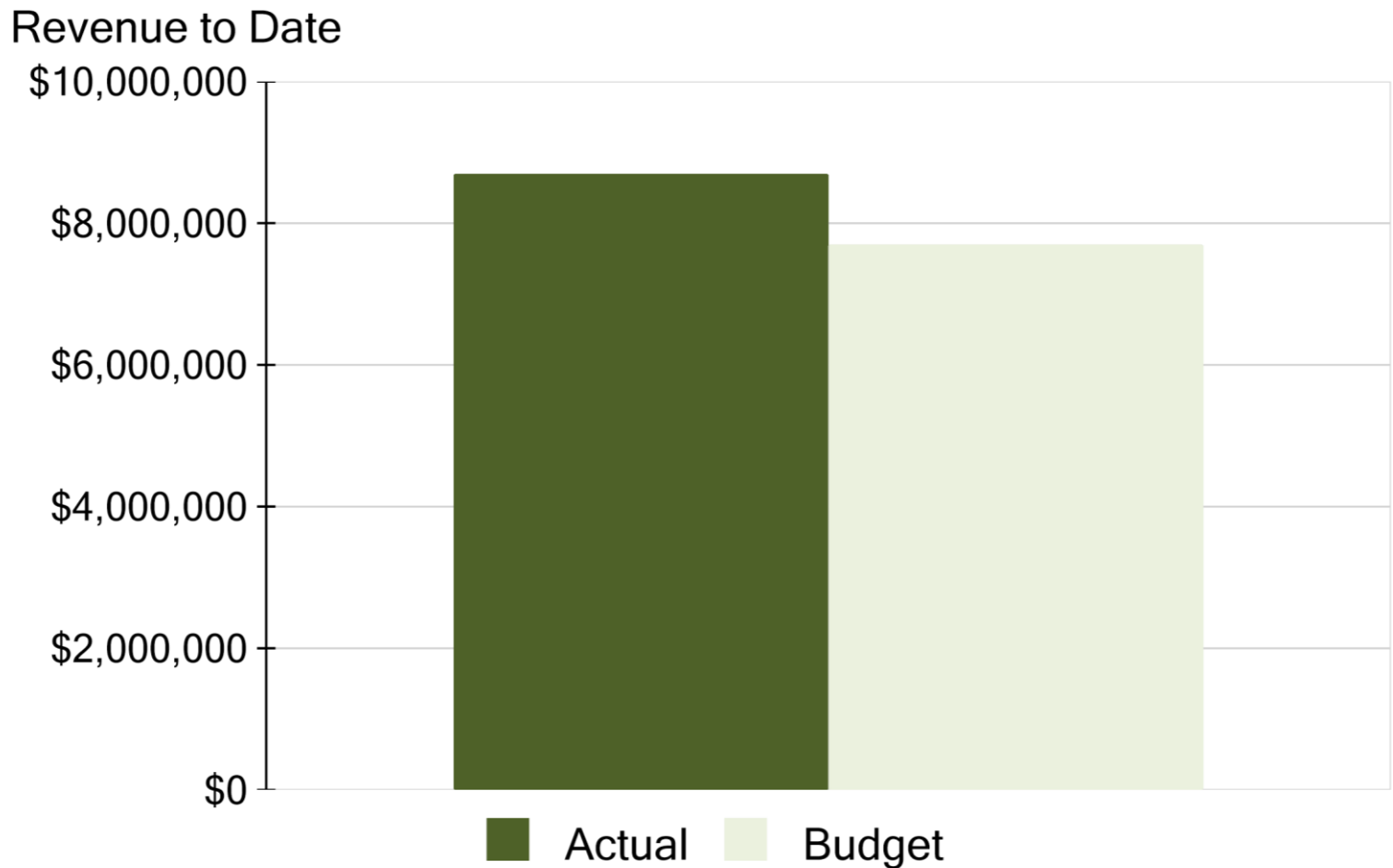
Current: 1.7 **Target:** > 1.0

Formula:
(Current Assets) / (Current Liabilities)

Financial Snapshot

FY 2023-2024, July - March

Cash Balance
 **\$5,336,270**



Revenue Summary	
Actual	\$8,695,875
Budget	\$7,697,448
Actual to Budget	13.0 %

Expense Summary	
Actual	\$8,204,859
Budget	\$8,459,710
Actual to Budget	-3.0 %

Actual to Budget Summary

FY 2023-2024, July - March

Account Description	July - Last Closed			2023-2024		
	Actual	Budget	Variance \$	Total Budget	Actual to Total Budget %	Remaining Budget
LCFF Revenue	\$5,852,232	\$5,490,273	\$361,959	\$6,984,006	83.8 %	\$1,131,774
Federal Revenue	\$206,553	\$343,044	(\$136,491)	\$692,703	29.8 %	\$486,150
State Revenue	\$2,118,759	\$1,359,534	\$759,224	\$3,154,440	67.2 %	\$1,035,682
Local Revenue	\$518,331	\$504,595	\$13,736	\$647,681	80.0 %	\$129,349
Total Revenue	\$8,695,875	\$7,697,448	\$998,427	\$11,478,830	75.8 %	\$2,782,955
Certificated Salaries	\$2,373,165	\$2,493,131	\$119,967	\$3,281,221	72.3 %	\$908,056
Classified Salaries	\$1,417,945	\$1,416,479	(\$1,466)	\$1,949,742	72.7 %	\$531,796
Benefits	\$1,377,440	\$1,395,085	\$17,645	\$1,925,307	71.5 %	\$547,867
Total Personnel Expenses	\$5,168,550	\$5,304,695	\$136,145	\$7,156,270	72.2 %	\$1,987,720
Books and Supplies	\$564,269	\$607,042	\$42,772	\$760,170	74.2 %	\$195,901
Services	\$2,472,039	\$2,453,609	(\$18,431)	\$3,216,812	76.8 %	\$744,772
Capital Outlay	-	\$94,364	\$94,364	\$188,751	0.0 %	\$188,751
Total Operational Expenses	\$3,036,309	\$3,155,015	\$118,706	\$4,165,732	72.9 %	\$1,129,423
Total Expenses	\$8,204,859	\$8,459,710	\$254,851	\$11,322,002	72.5 %	\$3,117,143
Net Income	\$491,016	(\$762,262)	\$1,253,278	\$156,828	313.1 %	(\$334,188)

Revenue
\$8,695,875

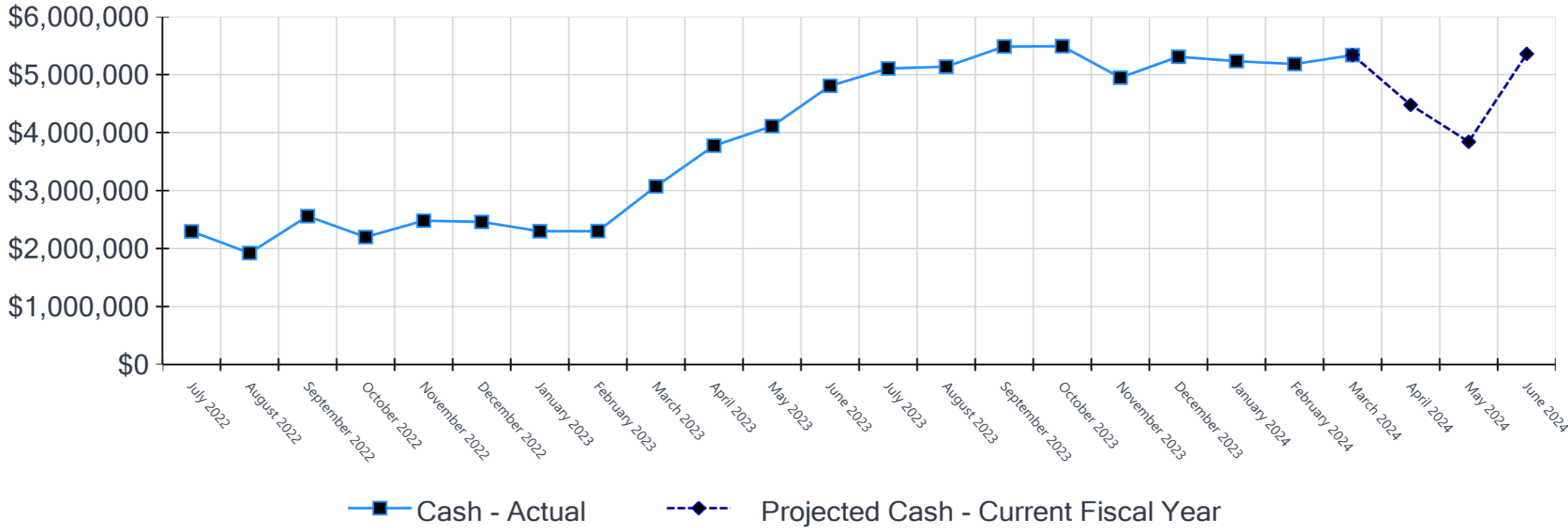
Expenses
\$8,204,859

Surplus / (Deficit)
\$491,016

This report displays all actual and budgeted revenue and expenditures by object code series and by month. This report can be useful in revenue in a timely manner and that you stay within board approved expenditure levels.

Monthly Cash Balance Over Time

Current fiscal year and prior year



	Cash Amount	Actual or Projected
July 2022	\$2,295,551.56	Actual
August 2022	\$1,922,918.11	Actual
September 2022	\$2,557,782.24	Actual
October 2022	\$2,198,569.21	Actual
November 2022	\$2,480,310.93	Actual
December 2022	\$2,459,445.28	Actual
January 2023	\$2,298,377.74	Actual
February 2023	\$2,299,239.81	Actual
March 2023	\$3,071,585.49	Actual
April 2023	\$3,773,553.23	Actual
May 2023	\$4,109,563.31	Actual
June 2023	\$4,806,179.14	Actual

	Cash Amount	Actual or Projected
July 2023	\$5,105,051.24	Actual
August 2023	\$5,137,279.81	Actual
September 2023	\$5,483,567.39	Actual
October 2023	\$5,489,067.58	Actual
November 2023	\$4,947,787.03	Actual
December 2023	\$5,308,408.38	Actual
January 2024	\$5,230,641.73	Actual
February 2024	\$5,181,529.21	Actual
March 2024	\$5,336,270.05	Actual
April 2024	\$4,477,823.57	Projected
May 2024	\$3,840,817.31	Projected
June 2024	\$5,356,777.66	Projected

Balance Sheet Summary FY 2023-2024 - March

Assets	
Current Assets	
Accounts Receivable	\$351,207
Cash and Cash Equivalents	\$5,336,270
Prepaid Expenses	\$20,117
Total Current Assets	\$5,707,594
Fixed Assets	
Accumulated Depreciation	(\$1,894,673)
Fixed Assets	\$14,059,337
Total Fixed Assets	\$12,164,664
Other Assets	
Other Assets	\$18,466
Total Other Assets	\$18,466
Total Assets	\$17,890,724

Liabilities and Net Assets	
Short-term Liabilities	
Accounts Payable	\$164,836
Accrued Liabilities	\$238,816
Loans Payable Current	\$1,005,438
Other Short Term Liability	\$1,879,246
Total Short-term Liabilities	\$3,288,336
Long-term Liabilities	
Other Liabilities	\$11,743,266
Total Long-term Liabilities	\$11,743,266
Total Liabilities	\$15,059,152
Net Assets	
Total Unrestricted Net Assets	\$2,295,351
Total Restricted Net Assets	\$45,206
Total Net Increase/(Decrease) in Net Assets	\$491,016
Total Net Assets	\$2,831,572
Total Liabilities and Net Assets	\$17,890,724

Liquidity Ratio

1.7

The balance sheet displays all of the school’s assets and the school’s obligations (‘liabilities’) at a particular point in time. It is a useful way to ensure the school has enough money to pay off its debts.

Looking Ahead

5/15/2024	Form 990 Return of Exempt Organization
5/20/2024	Charter school information survey due to CDE
5/22/2024	Webinar #10
5/31/2024	Universal Pre-K grant survey due
6/1/2024	June Board Meeting: Approval of LCAP, Budget, and ConApp, Dashboard Local Indicators, due 6/30
6/5/2024	SB740 application due
6/12/2024	Summer Office Hours
6/30/2024	Prop 28 Arts and Music annual report due
	Spring Consolidated Application / CARS report forms close

CSMC Charter School Support Team



Tom Nichols
Executive Vice President of Client
Services and Operations
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Kristin Nowak
Regional SBM Director
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Dennis Nguyen
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HELPING THE EDUCATION MOVEMENT SUCCEED ONE SCHOOL AT A TIME

POWERED BY:



Charter Vision

info@csmci.com
Office: 888.994.CSMC
43460 Ridge Park Dr., Ste. 100
Temecula, Ca 92590



May 8, 2024 Executive Director Board Report

Current Enrollment: 624 enrolled (was at 627)

2024-25 Prospective Enrollment Range:

- Projecting in the current draft budget 626 student with an ADA of 93% (trending at P2-ADA Report Submission (93.86%))
- Current forecast based on intent to returns and interest can be up to 649 students



OCEAA & CSMC FY24-25 Budget

CATEGORY	FY23-24 FINAL BUDGET	FY24-25 INITIAL	VARIANCE	FY24-25 REVISION #1	FY24-25 REVISION #2
TOTAL ENROLLMENT	629	626	(3)	626	626
AVERAGE DAILY ATTENDANCE	578.7	582.2	3.5	582.2	582.2
REVENUE					
State LCFF Revenue	6,984,006	8,067,653	1,083,647	8,067,653	8,067,653
Federal Revenue	692,703	673,188	(19,516)	673,188	673,188
Other State Revenue	3,357,923	3,101,245	(256,678)	3,101,245	3,101,245
Local Revenue	647,681	545,000	(102,681)	545,000	545,000
TOTAL REVENUE	11,682,313	12,387,086	704,773	12,387,086	12,387,086
EXPENSES					
Certificated Salaries	3,281,221	3,574,518	293,297	3,574,518	3,574,518
Classified Salaries	1,949,742	2,258,364	308,622	2,258,364	2,258,364
Benefits	1,925,307	2,100,975	175,667	2,100,975	2,100,975
TOTAL PERSONNEL EXPENSES	7,156,270	7,933,856	777,586	7,933,856	7,933,856
Books and Supplies	760,170	833,766	73,596	833,766	833,766
Services and Other Operating Expenses	3,216,812	3,361,824	145,013	3,361,824	3,361,824
Capital Outlay	188,751	188,751	-	188,751	188,751
Other Outgoing	-	-	-	-	-
TOTAL OTHER EXPENSES	4,165,732	4,384,341	218,609	4,384,341	4,384,341
TOTAL EXPENSES	11,322,002	12,318,197	996,195	12,318,197	12,318,197
SUMMARY					
SURPLUS\ (DEFICIT)	360,310	68,889	(291,422)	68,889	68,889
% of LCFF Revenue	5.2%	0.9%		0.9%	0.9%
BEGINNING FUND BALANCE	2,340,556	\$ 2,700,866		\$ 2,700,866	\$ 2,700,866
ENDING BALANCE	2,700,866	\$ 2,769,755		\$ 2,769,755	\$ 2,769,755
% of LCFF Revenue	39%	34.3%		34.3%	34.3%



DRAFT 2024-25 Budget Preview and Historical Spent

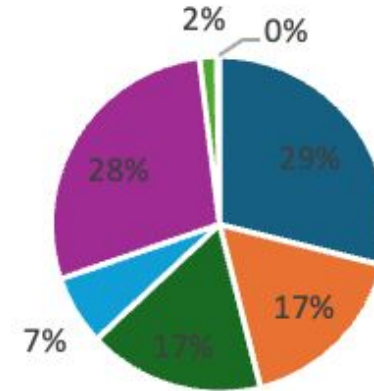
Assumptions

- **No salary freezes**
 - Teachers movement on step & collum
 - Classified increase plans based on performance evaluations and years of service
- **No major operation cost reductions (see slides)**
- **Health & Welfare had projected increase of 4%, trending at 11% if no changes.**
 - See renewal proposal received 5/7/24 to review options
- **Property & Liability projected increase of 10% (proposal coming, 23-24 was 6%)**
- **One- time funds planned:**
 - ELOP \$1,128,437
 - KIT 7032 \$ 100,000
 - LREBG \$ 100,000
 - Exhausted FY23/24: UPK, EEF & KIT (Prop 28 tbd)



Expense Category	23-24 Expenses as 2nd Interim	
Certificated Salaries	\$	3,281,221
Classified Salaries	\$	1,949,742
Employee Benefits	\$	1,925,307
Books and Supplies	\$	760,170
Services & Other Operating Expenses	\$	3,216,812
Capital Outlay (Depreciation etc.)	\$	188,751
Other Outgo (Interest/ Amortization of Loan)	\$	30,000

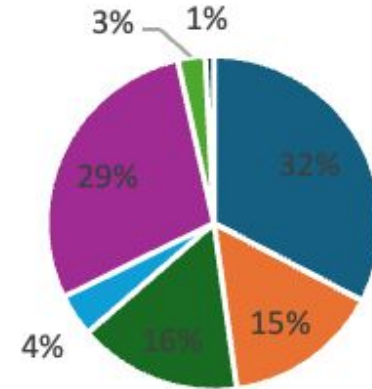
2023-24 OCEAA Expenses



- Certificated Salaries
- Classified Salaries
- Employee Benefits
- Books and Supplies
- Services & Other Operating Expenses
- Capital Outlay
- Other Outgo

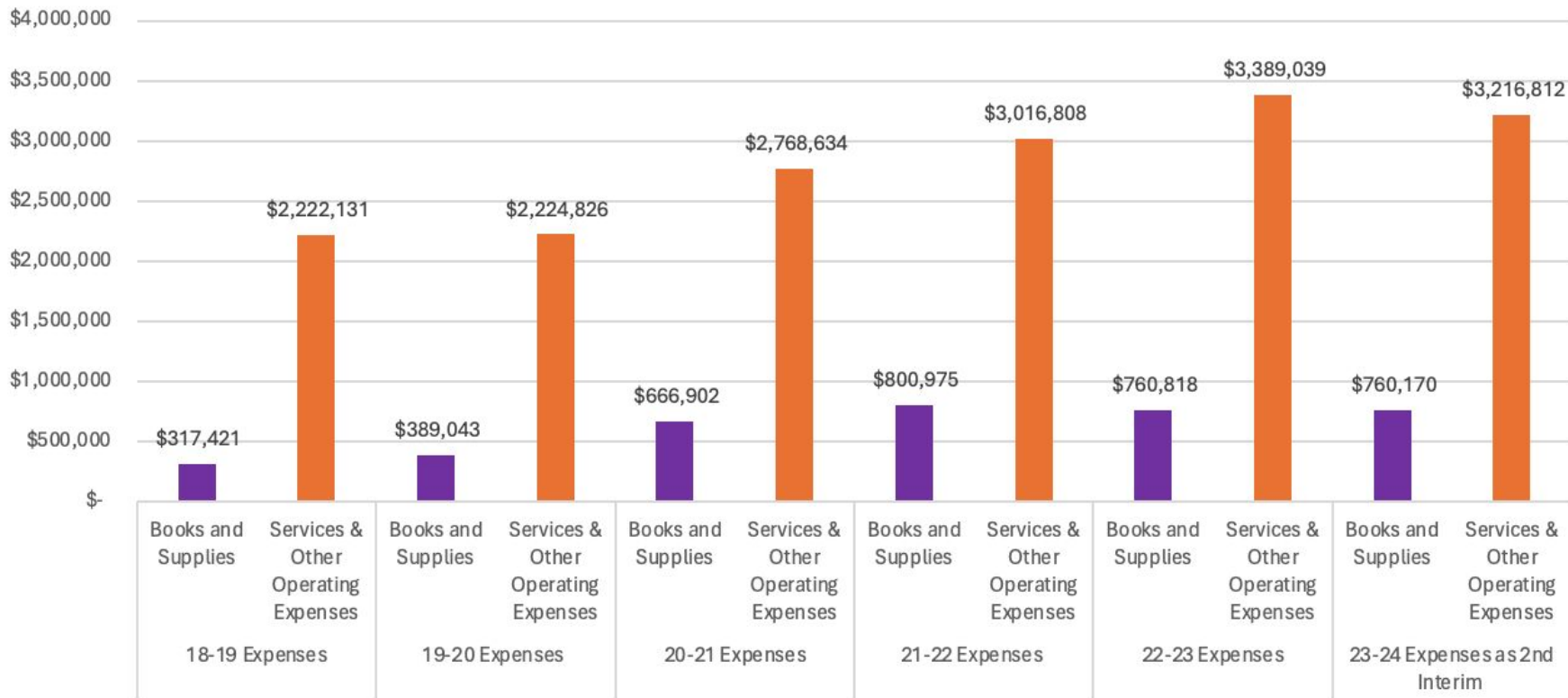
Expense Category	18-19 Expenses
Certificated Salaries	\$ 2,524,133
Classified Salaries	\$ 1,171,243
Employee Benefits	\$ 1,221,712
Books and Supplies	\$ 317,421
Services & Other Operating Expenses	\$ 2,222,131
Capital Outlay	\$ 205,919
Other Outgo	\$ 65,124

2018-19 OCEAA Expenses



- Certificated Salaries
- Classified Salaries
- Employee Benefits
- Books and Supplies
- Services & Other Operating Expenses
- Capital Outlay
- Other Outgo

2018-24 Books, Supplies and Operating Expenses



% Increase from 18-19 to 23-24: By Object Code

Expense Category	2023-24	2018-19	% Impact
Approved Textbooks and Core Curricula Materials	\$100,000	\$21,066	375%
Books and Other Reference Materials	\$30,000	\$7,851	282%
Materials and Supplies	\$110,000	\$58,919	87%
Positive Behavior Expenses	\$ -	\$1,238	-100%
Classroom Materials and Supplies	\$40,000	\$16,861	137%
Materials for Plant Maintenance	\$60,000	\$29,446	104%
Noncapitalized Equipment	\$75,000	\$13,636	450%
Computer Software	\$40,170	\$5,155	679%
Noncapitalized Student Equipment	\$40,000	\$20,081	99%
Food and Food Supplies	\$265,000	\$143,168	85%
Travel and Conferences	\$20,000	\$5,685	252%
Parking	\$85,000	\$20,080	323%
Training and Development Expense	\$85,000	\$26,776	217%



Can adjust

Harder to adjust

Very hard to adjust

% Increase from 18-19 to 23-24: By Object Code

Expense Category	2023-24	2018-19	% Impact
Dues and Memberships	\$18,000	\$35,061	-49%
Insurance	\$118,266	\$44,872	164%
Operation and Housekeeping Services	\$1,000	\$32,530	-97%
Utilities	\$150,000	\$90,852	65%
Space Rental/Leases Expense	\$935,575	\$1,069,942	-13%
Building Maintenance	\$24,000	\$71,269	-66%
Other Space Rental	\$12,360	\$45,637	-73%
Equipment Rental/Lease Expense	\$24,000	\$25,848	-7%
Equipment Repair	\$25,000	\$3,679	580%
Professional/Consulting Services and Operating Expenditures	\$280,000	\$106,102	164%
Banking and Payroll Service Fees	\$50,000	\$30,568	64%
Legal Services	\$45,000	\$53,311	-16%
Audit Services	\$24,500	\$9,865	148%



Can adjust

Harder to adjust

Very hard to adjust

% Increase from 18-19 to 23-24: By Object Code

Expense Category	2023-24	2018-19	% Impact
Educational Consultants	\$800,000	\$100,388	697%
Student Transportation	\$40,000	\$27,958	43%
Other Student Activities	\$600	\$43	1312%
Advertising/Recruiting	\$32,000	\$9,314	244%
Fundraising Expense	\$48,410	\$50,723	-5%
Field Trip Expenses	\$41,200	\$26,862	53%
Financial Services	\$108,000	\$87,408	24%
Personnel Services	\$3,000	\$3,206	-6%
District Oversight Fee	\$69,840	\$60,160	16%
IT Services	\$130,000	\$115,818	12%
Interest Expense/Fees	\$500	\$4,912	-90%
Communications (Tele., Internet, Copies, Postage, Messenger)	\$40,000	\$63,263	-37%



Can adjust

Harder to adjust

Very hard to adjust

Difference from 24-25 to 23-24: By Object Code

Expense Category	2024-25	2023-24	% Impact	\$ Difference
Approved Textbooks and Core Curricula Materials	\$ 126,911	\$ 100,000	27%	\$ 26,911
Books and Other Reference Materials	\$ 5,000	\$ 30,000	-83%	\$ (25,000)
Materials and Supplies	\$ 120,000	\$ 110,000	9%	\$ 10,000
Classroom Materials and Supplies	\$ 50,000	\$ 40,000	25%	\$ 10,000
Materials for Plant Maintenance	\$ 50,000	\$ 60,000	-17%	\$ (10,000)
Noncapitalized Equipment	\$ 100,000	\$ 75,000	33%	\$ 25,000
Computer Software	\$ 76,855	\$ 40,170	91%	\$ 36,685
Noncapitalized Student Equipment	\$ 30,000	\$ 40,000	-25%	\$ (10,000)
Food and Food Supplies	\$ 275,000	\$ 265,000	4%	\$ 10,000
Travel and Conferences	\$ 15,000	\$ 20,000	-25%	\$ (5,000)
Parking	\$ 85,000	\$ 85,000	0%	\$ -
Training and Development Expense	\$ 75,000	\$ 85,000	-12%	\$ (10,000)



Difference from 24-25 to 23-24: By Object Code

Expense Category	2024-25	2023-24	% Impact	\$ Difference
Dues and Memberships	\$ 13,000	\$ 18,000	-28%	\$ (5,000)
Insurance	\$ 130,093	\$ 118,266	10%	\$ 11,827
Utilities	\$ 160,000	\$ 150,000	7%	\$ 10,000
Space Rental/Leases Expense	\$ 945,875	\$ 935,575	1%	\$ 10,300
Building Maintenance	\$ 30,000	\$ 24,000	25%	\$ 6,000
Other Space Rental	\$ 10,000	\$ 12,360	-19%	\$ (2,360)
Equipment Rental/Lease Expense	\$ 25,000	\$ 24,000	4%	\$ 1,000
Equipment Repair	\$ 20,000	\$ 25,000	-20%	\$ (5,000)
Professional/Consulting Services and Operating Expenditures	\$ 260,000	\$ 280,000	-7%	\$ (20,000)
Banking and Payroll Service Fees	\$ 55,000	\$ 50,000	10%	\$ 5,000
Legal Services	\$ 40,000	\$ 45,000	-11%	\$ (5,000)
Audit Services	\$ 25,580	\$ 24,500	4%	\$ 1,080



Difference from 24-25 to 23-24: By Object Code

Expense Category	2024-25	2023-24	% Impact	\$ Difference
Educational Consultants	\$ 925,000	\$ 800,000	16%	\$ 125,000
Student Transportation	\$ 45,000	\$ 40,000	13%	\$ 5,000
Other Student Activities	\$ 600	\$ 600	0%	\$ -
Advertising/Recruiting	\$ 32,000	\$ 32,000	0%	\$ -
Fundraising Expense	\$ 49,000	\$ 48,410	1%	\$ 590
Field Trip Expenses	\$ 45,000	\$ 41,200	9%	\$ 3,800
Financial Services	\$ 120,000	\$ 108,000	11%	\$ 12,000
Personnel Services	\$ 2,500	\$ 3,000	-17%	\$ (500)
District Oversight Fee	\$ 80,677	\$ 69,840	16%	\$ 10,836
IT Services	\$ 132,000	\$ 130,000	2%	\$ 2,000
Interest Expense/Fees	\$ 500	\$ 500	0%	\$ -
Communications (Tele., Internet, Copies,Postage,Messenger)	\$ 40,000	\$ 40,000	0%	\$ -

Combined Adjustments:

\$ (97,860)



Enrollment:

Year	KEDS Enrollment	School Enrollment	% of KEDS Enrollment
2023-24	242	624	39%
2022-23	220	606	36%

Operational Hours Use:

Program	Estimated Hours*	# of Hours	% of Operational Cost Use
Day School	7:00am - 3:00pm	8	72%
KEDS	3:00pm-6:00pm	3	28%

*Not that there are grade level staggered dismissal times and every Wednesday is an early release day.



Related Expenses:

Items	2024-25 Budget
Insurance	\$130,093
Utilities	\$160,000
Space Rental/Leases Expense	\$945,875
Building Maintenance	\$30,000
IT Services	\$132,000
Communications	\$40,000
Totals:	\$1,437,968

Q: Discussion on what approach we will take.



Square Footage Estimates:

Main building is 35,632 square feet including 23 classrooms (annually changes based on need), 2 resource support classrooms, library, staff lounge, staff workroom, 4 administrative offices, reception area, nurse's office, dining hall, fully functioning kitchen, storage rooms, playground, 3 dedicated arts related rooms.

OCEAA also Operates an “Annex” which is approximately 11,00 square feet including 6 classrooms, 1 resource support classroom, staff lounge, 2 staff workroom, 4 administrative offices, reception area, nurse's office, statilte functioning kitchen, storage rooms and playground

KEDS uses 2 classrooms at the annex, 9-11 classrooms at the main building, the playground is used at both buildings, bathrooms, offices.

Ritmos Pictures are in!

Web: <https://photos.app.goo.gl/hQtbvPxqa3mjEdDk8>

High resolution:

<https://photos.app.goo.gl/ffUD5YF1KNLn83cm7>

Sold \$ 2,870 in ticket sales.



RITMOS DEL MUNDO

April 13, 2024 | 2pm
Santa Ana High School Auditorium
520 W Walnut St., Santa Ana, CA 92701



Buy your tickets
Compra tus boletos
OCEAA.org





REVIVE
SANTA ANA

ORANGE COUNTY
C E A A
Educational Arts Academy

I contain multitudes

TUESDAY, APRIL 9, 2024

UCI BARCLAY THEATRE
4242 CAMPUS DRIVE, IRVINE
ADMISSIONS IS FREE/ RESERVATION REQUIRED

An expressive performance celebrating the
transformative power of writing"



Pics from I Contain Multitudes: <https://photos.app.goo.gl/q7JcgyZgyLEXoLPLA>



\$20,000 City of Santa Ana Arts Commission Grant

Maestra Loredó's 5th grade class has been invited to showcase their Ritmos Del Mundo performance on Saturday, May 25th in Irvine at 7pm. This would be part of the halftime show for the [Orange County Soccer Club game](#), which is expecting over 4,000 people. **FLYER COMING FOR COMMUNITY INVITE.**



Ritmos Del Mundo Encore Performance at Orange County Soccer Club Game

Q&A





Employee Benefits Insurance Renewal Meeting

May 8, 2024



Gallagher

Insurance | Risk Management | Consulting



Agenda

- Executive Summary
- Benefits Review
 - Medical
 - Dental
 - Vision
 - Life/Disability
 - Voluntary Worksite
 - Additional Voluntary Plans
- Renewal Timeline and Next Steps



Executive Summary

Current/Renewal	EE Count	Current Annual Premiums	Renewal Annual Premiums	Negotiated Renewal Annual Premiums	Option 1	Alternative Renewal Annual Premiums	Option 2	Alternative Renewal Annual Premiums
Medical					Medical- Downgrade		Medical- Alternative Carrier*	
Kaiser Gold 80 HMO 250/35	23	\$184,395	\$205,606	\$205,606	Kaiser Gold 80 HMO 1000/40	\$195,580	Kaiser Gold 80 HMO 250/35	\$205,606
Blue Shield Platinum Trio HMO 0/30	19	\$134,354	\$152,764	\$152,764	Blue Shield Gold Trio HMO 0/35	\$146,075	Anthem Platinum Priority Select HMO 0/30	\$125,871
Blue Shield Platinum Access+ HMO 0/30	10	\$100,410	\$109,290	\$109,290	Blue Shield Gold Access+ HMO 0/35	\$104,156	Anthem Platinum HMO 0/30	\$96,110
Blue Shield Gold Full PPO 750/30	8	\$93,055	\$104,415	\$104,415	Blue Shield Gold Full PPO 1000/35	\$103,005	Anthem Gold PPO 30/750/20%	\$94,357
Total Annual Premium	60	\$512,214	\$572,076	\$572,076	Total Annual Premium	\$548,816	Total Annual Premium	\$521,943
\$ Difference vs. Current			\$59,862	\$59,862	\$ Difference vs. Current	\$36,602	\$ Difference vs. Current	\$9,729
% Difference vs. Current			11.7%	11.7%	% Difference vs. Current	7.1%	% Difference vs. Current	1.9%
Dental					Dental		Dental	
Cigna DHMO	18	\$5,270	\$5,427	\$5,270	Cigna DHMO	\$5,270	Cigna DHMO	\$5,270
Cigna DPPO Low	15	\$11,150	\$11,652	\$11,149	Cigna DPPO Low	\$11,149	Cigna DPPO Low	\$11,149
Cigna DPPO High	27	\$31,754	\$33,183	\$31,754	Cigna DPPO High	\$31,754	Cigna DPPO High	\$31,754
Total Annual Premium	60	\$48,174	\$50,262	\$48,174	Total Annual Premium	\$48,174	Total Annual Premium	\$48,174
\$ Difference vs. Current			\$2,088	\$0	\$ Difference vs. Current	\$0	\$ Difference vs. Current	\$0
% Difference vs. Current			4.3%	0.0%	% Difference vs. Current	0.0%	% Difference vs. Current	0.0%
Vision					Vision		Vision	
EyeMed	65	\$6,040	\$6,040	\$6,040	EyeMed	\$6,040	Eyemed	\$6,040
Total Annual Premium	65	\$6,040	\$6,040	\$6,040	Total Annual Premium	\$6,040	Total Annual Premium	\$6,040
\$ Difference vs. Current			\$0	\$0	\$ Difference vs. Current	\$0	\$ Difference vs. Current	\$0
% Difference vs. Current			0.0%	0.0%	% Difference vs. Current	0.0%	% Difference vs. Current	0.0%
LADD					LADD		LADD	
Mutual of Omaha	86	\$3,612	\$3,612	\$3,612	Mutual of Omaha	\$3,612	Mutual of Omaha	\$3,612
Total Annual Premium	86	\$3,612	\$3,612	\$3,612	Total Annual Premium	\$3,612	Total Annual Premium	\$3,612
\$ Difference vs. Current			\$0	\$0	\$ Difference vs. Current	\$0	\$ Difference vs. Current	\$0
% Difference vs. Current			\$0.0	\$0.0	% Difference vs. Current	0.0%	% Difference vs. Current	0.0%
LTD					LTD		LTD	
Mutual of Omaha	86	\$4,516	\$4,516	\$4,516	Mutual of Omaha	\$4,516	Mutual of Omaha	\$4,516
Total Annual Premium	86	\$4,516	\$4,516	\$4,516	Total Annual Premium	\$4,516	Total Annual Premium	\$4,516
\$ Difference vs. Current			\$0	\$0	\$ Difference vs. Current	\$0	\$ Difference vs. Current	\$0
% Difference vs. Current			\$0.0	\$0.0	% Difference vs. Current	0.0%	% Difference vs. Current	0.0%
Benefits Annual Total		\$574,555	\$636,505	\$634,417	Benefits Annual Total	\$611,157	Benefits Annual Total	\$584,284
\$ Difference from Current			\$61,950	\$59,862	\$ Difference from Current	\$36,602	\$ Difference from Current	\$9,729
% Difference from Current			10.8%	10.4%	% Difference from Current	6.4%	% Difference from Current	1.7%

*Anthem requires 25% participation alongside another carrier



Medical Kaiser Gold HMO

	Current Kaiser Gold 80 HMO 250/35 7/1/2023	Renewal Kaiser Gold 80 HMO 250/35 7/1/2024	Alternative- Downgrade Kaiser Gold 80 HMO 1000/40 7/1/2024	Alternative- Downgrade Kaiser Silver 70 HMO 1900/65 7/1/2024
DEDUCTIBLE				
Individual	HMO: \$250	HMO: \$250	HMO: \$1,000	HMO: \$1,900
Family	HMO: \$500	HMO: \$500	HMO: \$2,000	HMO: \$3,800
OUT-OF-POCKET MAX				
Individual	HMO: \$7,800 (includes ded)	HMO: \$7,800 (includes ded)	HMO: \$7,800 (includes ded)	HMO: \$8,750 (includes ded)
Family	HMO: \$15,600 (includes ded)	HMO: \$15,600 (includes ded)	HMO: \$15,600 (embedded; includes ded)	HMO: \$17,500 (includes ded)
PHYSICIAN SERVICES				
Office Visits	HMO: \$35/\$55 (ded waived)	HMO: \$35/\$55 (ded waived)	HMO: \$40/\$60 (ded waived)	HMO: \$65/\$100 (ded waived)
Telemedicine	HMO: 0% (ded waived)	HMO: 0% (ded waived)	HMO: 0% (ded waived)	HMO: 0% (ded waived)
Preventive Care	HMO: 0% (ded waived)	HMO: 0% (ded waived)	HMO: 0% (ded waived)	HMO: 0% (ded waived)
Diagnostic Lab/X-Ray	HMO: \$35/\$55 (ded waived)	HMO: \$35/\$55 (ded waived)	HMO: \$30/\$60 (ded waived)	HMO: \$30/\$75 (ded waived)
Imaging (CT/PET scans, MRIs)	HMO: \$250 after ded	HMO: \$250 after ded	HMO: \$350 after ded	HMO: \$400 after ded
PRESCRIPTION DRUGS				
Pharmacy Deductible	HMO: None	HMO: None	HMO: \$250/\$500 (Subject to Tiers 2-4)	HMO: Combined w/Medical (Subject to Tier 4)
Tier 1 (Generic Formulary)	HMO: \$15 (up to 30-day supply)	HMO: \$15 (up to 30-day supply)	HMO: \$20 (up to 30-day supply)	HMO: \$20 (up to 30-day supply)
Tier 2 (Preferred Brand Formulary)	HMO: \$40 (up to 30-day supply)	HMO: \$40 (up to 30-day supply)	HMO: \$50 (up to 30-day supply)	HMO: \$100 (up to 30-day supply)
Tier 3 (Non-Preferred Brand Formulary)	Same as preferred brand drugs HMO: when approved through exception process	Same as preferred brand drugs HMO: when approved through exception process	Same as preferred brand drugs HMO: when approved through exception process	Same as preferred brand drugs HMO: when approved through exception process
Tier 4 (Specialty Drugs)	HMO: 20% up to \$250 (up to 30-day supply)	HMO: 20% up to \$250 (up to 30-day supply)	HMO: 20% up to \$250 (up to 30-day supply)	HMO: 20% up to \$250 (up to 30-day supply)
Mail Order	HMO: 2x Retail (up to 100-day supply)	HMO: 2x Retail (up to 100-day supply)	HMO: 2x Retail (up to 100-day supply)	HMO: 2x Retail (up to 100-day supply)
HOSPITAL FACILITY SERVICES				
Inpatient Hospital Services	HMO: \$600/day after ded, 5 days max	HMO: \$600/day after ded, 5 days max	HMO: \$600/day after ded, 5 days max	HMO: 45% after ded
Outpatient Surgery in a Hospital	HMO: \$335 after ded	HMO: \$335 after ded	HMO: \$350 (ded waived)	HMO: 45% after ded
Ambulatory Surgical Center	HMO: \$335 after ded	HMO: \$335 after ded	HMO: \$350 (ded waived)	HMO: 45% after ded
EMERGENCY SERVICES				
Emergency Room	HMO: \$250 after ded (waived if admitted)	HMO: \$250 after ded (waived if admitted)	HMO: \$350 (ded waived) ; waived if admitted	HMO: 45% after ded (waived if admitted)
Emergency Transport/Ambulance	HMO: \$250 after ded	HMO: \$250 after ded	HMO: \$350 (ded waived)	HMO: 45% after ded
Urgent Care	HMO: \$35 (ded waived)	HMO: \$35 (ded waived)	HMO: \$40 (ded waived)	HMO: \$65 (ded waived)



Medical Kaiser Gold HMO Rates

	Current						Renewal				Alternative- Downgrade				Alternative- Downgrade			
	Kaiser						Kaiser				Kaiser				Kaiser			
	Gold 80 HMO 250/35						Gold 80 HMO 250/35				Gold 80 HMO 1000/40				Silver 70 HMO 1900/65			
	7/1/2023						7/1/2024				7/1/2024				7/1/2024			
Name	Age	Dep	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total
Joscelin Aguirre Reyes	25	EE	CA18	\$379.17	\$0.00	\$379.17	CA18	\$415.64	\$0.00	\$415.64	CA18	\$395.27	\$0.00	\$395.27	CA18	\$341.81	\$0.00	\$341.81
Guadalupe Barba	44	EE	CA18	\$514.53	\$0.00	\$514.53	CA18	\$578.33	\$0.00	\$578.33	CA18	\$549.99	\$0.00	\$549.99	CA18	\$475.60	\$0.00	\$475.60
Elmer Barrera	34	EE	CA18	\$454.24	\$0.00	\$454.24	CA18	\$502.58	\$0.00	\$502.58	CA18	\$477.94	\$0.00	\$477.94	CA18	\$413.30	\$0.00	\$413.30
Febe Barrera	32	EE	CA18	\$439.45	\$0.00	\$439.45	CA18	\$489.74	\$0.00	\$489.74	CA18	\$465.74	\$0.00	\$465.74	CA18	\$402.75	\$0.00	\$402.75
Jocelyn Calderon	33	EE	CA18	\$448.55	\$0.00	\$448.55	CA18	\$495.95	\$0.00	\$495.95	CA18	\$471.65	\$0.00	\$471.65	CA18	\$407.85	\$0.00	\$407.85
Stephani Donis	34	EE	CA18	\$454.24	\$0.00	\$454.24	CA18	\$502.58	\$0.00	\$502.58	CA18	\$477.94	\$0.00	\$477.94	CA18	\$413.30	\$0.00	\$413.30
Adrimar Garcia Flores	27	EE	CA18	\$388.27	\$0.00	\$388.27	CA18	\$433.85	\$0.00	\$433.85	CA18	\$412.59	\$0.00	\$412.59	CA18	\$356.79	\$0.00	\$356.79
Maryel Gonzalez	41	EC	CA18	\$484.57	\$304.05	\$788.62	CA18	\$539.01	\$330.97	\$869.98	CA18	\$512.59	\$315.45	\$828.04	CA18	\$443.26	\$274.71	\$717.97
Karina Guadalupe	25	EE	CA18	\$379.17	\$0.00	\$379.17	CA18	\$415.64	\$0.00	\$415.64	CA18	\$395.27	\$0.00	\$395.27	CA18	\$341.81	\$0.00	\$341.81
Angie Guemes	20	EE	CA18	\$356.79	\$0.00	\$356.79	CA18	\$401.56	\$0.00	\$401.56	CA18	\$381.88	\$0.00	\$381.88	CA18	\$330.23	\$0.00	\$330.23
Elena Jimenez	28	EE	CA18	\$397.37	\$0.00	\$397.37	CA18	\$450.00	\$0.00	\$450.00	CA18	\$427.95	\$0.00	\$427.95	CA18	\$370.06	\$0.00	\$370.06
Jennifer Lopez	25	EE	CA18	\$379.17	\$0.00	\$379.17	CA18	\$415.64	\$0.00	\$415.64	CA18	\$395.27	\$0.00	\$395.27	CA18	\$341.81	\$0.00	\$341.81
Sabrina Lozano	50	FA	CA18	\$646.86	\$1,348.23	\$1,995.09	CA18	\$739.37	\$1,506.47	\$2,245.84	CA18	\$703.14	\$1,434.04	\$2,137.18	CA18	\$608.03	\$1,243.93	\$1,851.96
Magdalena Martinez	46	ES	CA18	\$547.51	\$547.51	\$1,095.02	CA18	\$620.97	\$620.97	\$1,241.94	CA18	\$590.54	\$590.54	\$1,181.08	CA18	\$510.67	\$510.67	\$1,021.34
Alexia Mendoza	25	EE	CA18	\$379.17	\$0.00	\$379.17	CA18	\$415.64	\$0.00	\$415.64	CA18	\$395.27	\$0.00	\$395.27	CA18	\$341.81	\$0.00	\$341.81
Joseph Mora-Mendoza	27	EE	CA18	\$388.27	\$0.00	\$388.27	CA18	\$433.85	\$0.00	\$433.85	CA18	\$412.59	\$0.00	\$412.59	CA18	\$356.79	\$0.00	\$356.79
Beatriz Perez	32	FA	CA18	\$439.45	\$1,360.70	\$1,800.15	CA18	\$489.74	\$1,488.86	\$1,978.60	CA18	\$465.74	\$1,418.00	\$1,883.74	CA18	\$402.75	\$1,231.98	\$1,634.73
Sylvia Perez Ugalde	57	ES	CA18	\$884.59	\$1,137.51	\$2,022.10	CA18	\$1,008.88	\$1,241.94	\$2,250.82	CA18	\$959.43	\$1,181.07	\$2,140.50	CA18	\$829.66	\$1,021.32	\$1,850.98
Yeslene Reynoso	50	EE	CA18	\$646.86	\$0.00	\$646.86	CA18	\$739.37	\$0.00	\$739.37	CA18	\$703.14	\$0.00	\$703.14	CA18	\$608.03	\$0.00	\$608.03
Abigail Sanchez Ortega	26	EE	CA18	\$380.68	\$0.00	\$380.68	CA18	\$423.92	\$0.00	\$423.92	CA18	\$403.14	\$0.00	\$403.14	CA18	\$348.62	\$0.00	\$348.62
Carlos Santana	42	EE	CA18	\$493.67	\$0.00	\$493.67	CA18	\$548.53	\$0.00	\$548.53	CA18	\$521.65	\$0.00	\$521.65	CA18	\$451.09	\$0.00	\$451.09
Jasmine Tamayo	27	EE	CA18	\$388.27	\$0.00	\$388.27	CA18	\$433.85	\$0.00	\$433.85	CA18	\$412.59	\$0.00	\$412.59	CA18	\$356.79	\$0.00	\$356.79
David Vejar	28	EE	CA18	\$397.37	\$0.00	\$397.37	CA18	\$450.00	\$0.00	\$450.00	CA18	\$427.95	\$0.00	\$427.95	CA18	\$370.06	\$0.00	\$370.06
Estimated Monthly Totals:				\$10,668.22	\$4,698.00	\$15,366.22		\$11,944.64	\$5,189.21	\$17,133.85		\$11,359.26	\$4,939.10	\$16,298.36		\$9,822.87	\$4,282.61	\$14,105.48
Estimated Annual Totals:					\$184,395			\$205,606				\$195,580				\$169,266		
\$ Difference vs. Current:								\$21,212				\$11,186				-\$15,129		
% Difference vs Current:								11.5%				6.1%				-8.2%		



Medical Blue Shield Plat. Trio HMO

	Current Blue Shield Platinum Trio HMO 0/30 7/1/2023	Renewal Blue Shield Platinum Trio HMO 0/30 7/1/2024	Alternative- Downgrade Blue Shield Gold Trio HMO 0/35 7/1/2024	Alternative- Downgrade Blue Shield Gold Trio HMO 500/35 7/1/2024	Alternative Carrier Anthem BC Platinum Priority Select HMO 0/30 (9B21) 7/1/2024
DEDUCTIBLE					
Individual	HMO: \$0	HMO: \$0	HMO: \$0	HMO: \$500	HMO: \$0
Family	HMO: \$0	HMO: \$0	HMO: \$0	HMO: \$1,000	HMO: \$0
OUT-OF-POCKET MAX					
Individual	HMO: \$2,700	HMO: \$2,700	HMO: \$7,500	HMO: \$7,500 (includes ded)	HMO: \$2,700
Family	HMO: \$5,400	HMO: \$5,400	HMO: \$15,000	HMO: \$15,000 (includes ded)	HMO: \$5,400
PHYSICIAN SERVICES					
Office Visits	HMO: \$30/\$50	HMO: \$30/\$50	HMO: \$35/\$60	HMO: \$35/\$55 (ded waived)	HMO: \$30/\$50
Telemedicine	HMO: 0%	HMO: 0%	HMO: 0%	HMO: 0% (ded waived)	HMO: Virtual Care: 0%/ \$50
Preventive Care	HMO: 0%	HMO: 0%	HMO: 0%	HMO: 0% (ded waived)	HMO: 0%
Diagnostic Lab/X-Ray	HMO: \$30/\$50	HMO: \$30/\$50	HMO: \$35/\$55	HMO: \$35/\$55 (ded waived)	HMO: Office: \$10 ; Freestanding: 0%/\$10 ; OPHospital: \$15/\$30
Imaging (CT/PET scans, MRIs)	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50 (ded waived); OPHosp: \$250 after ded	HMO: Office/Freestanding: \$100 ; OPHospital: \$250
PRESCRIPTION DRUGS					
Pharmacy Deductible	HMO: None	HMO: None	HMO: None	HMO: None	HMO: None (Select Rx)
Tier 1 (Generic Formulary)	HMO: \$5 (Level A); \$10 (Level B) (30-day supply)	HMO: \$5 (Level A); \$10 (Level B) (30-day supply)	HMO: \$20 (Level A); \$25 (Level B) (30-day supply)	HMO: \$15 (Level A); \$20 (Level B) (30-day supply)	HMO: Level 1: \$5; Level 2: \$15
Tier 2 (Preferred Brand Formulary)	HMO: \$15 (Level A); \$30 (Level B) (30-day supply)	HMO: \$15 (Level A); \$30 (Level B) (30-day supply)	HMO: \$35 (Level A); \$55 (Level B) (30-day supply)	HMO: \$35 (Level A); \$55 (Level B) (30-day supply)	HMO: Level 1: \$30; Level 2: \$40
Tier 3 (Non-Preferred Brand Formulary)	HMO: \$25 (Level A); \$45 (Level B) (30-day supply)	HMO: \$25 (Level A); \$45 (Level B) (30-day supply)	HMO: \$55 (Level A); \$85 (Level B) (30-day supply)	HMO: \$55 (Level A); \$85 (Level B) (30-day supply)	HMO: Level 1: \$50; Level 2: \$60
Tier 4 (Specialty Drugs)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: Level 1: 30% up to \$250; Level 2: 40% up to \$250
Mail Order	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tier 1: 2x Retail of Level 1; Tier 2-3: 2.5x Retail of Level 1
HOSPITAL FACILITY SERVICES					
Inpatient Hospital Services	HMO: \$500/day, 4 days max	HMO: \$500/day, 4 days max	HMO: \$600/day, 5 days max	HMO: 20% after ded	HMO: \$450/day , 4 days max
Outpatient Surgery in a Hospital	HMO: \$150	HMO: \$150	HMO: \$300	HMO: \$300 after ded	HMO: \$300
Ambulatory Surgical Center	HMO: \$100	HMO: \$100	HMO: \$150	HMO: \$150 after ded	HMO: \$250
EMERGENCY SERVICES					
Emergency Room	HMO: \$250 (waived if admitted)	HMO: \$250 (waived if admitted)	HMO: \$325 (waived if admitted)	HMO: \$300 after ded (waived if admitted)	HMO: \$275 (copay waived if admitted)
Emergency Transport/Ambulance	HMO: \$150	HMO: \$150	HMO: \$175	HMO: \$175 after ded	HMO: \$150
Urgent Care	HMO: \$30	HMO: \$30	HMO: \$35	HMO: \$35 (ded waived)	HMO: \$30



Medical Blue Shield Plat. Trio HMO Rates Gallagher

Insurance | Risk Management | Consulting

Name	Age	Dep	Current Blue Shield				Renewal Blue Shield				Alternative- Downgrade Blue Shield				Alternative- Downgrade Blue Shield				Alternative Carrier			
			Platinum Trio HMO 0/30				Platinum Trio HMO 0/30				Gold Trio HMO 0/35				Gold Trio HMO 500/35				Anthem BC Platinum Priority Select HMO 0/30 (9B21)			
			Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total
Nestor Barrios	29	EE	CA18	\$421.67	\$0.00	\$421.67	CA18	\$484.57	\$0.00	\$484.57	CA18	\$463.35	\$0.00	\$463.35	CA18	\$448.68	\$0.00	\$448.68	CA18	\$399.26	\$0.00	\$399.26
Lizette Beltran	37	EE	CA18	\$477.14	\$0.00	\$477.14	CA18	\$536.10	\$0.00	\$536.10	CA18	\$512.62	\$0.00	\$512.62	CA18	\$496.39	\$0.00	\$496.39	CA18	\$441.72	\$0.00	\$441.72
Diana Campuzano S.	25	EE	CA18	\$387.92	\$0.00	\$387.92	CA18	\$434.77	\$0.00	\$434.77	CA18	\$415.73	\$0.00	\$415.73	CA18	\$402.57	\$0.00	\$402.57	CA18	\$358.23	\$0.00	\$358.23
Joseph Cason	29	EE	CA18	\$421.67	\$0.00	\$421.67	CA18	\$484.57	\$0.00	\$484.57	CA18	\$463.35	\$0.00	\$463.35	CA18	\$448.68	\$0.00	\$448.68	CA18	\$399.26	\$0.00	\$399.26
Araceli Duenas Munoz	39	EE	CA18	\$483.35	\$0.00	\$483.35	CA18	\$546.49	\$0.00	\$546.49	CA18	\$522.56	\$0.00	\$522.56	CA18	\$506.01	\$0.00	\$506.01	CA18	\$450.28	\$0.00	\$450.28
Randy Garcia	24	EE	CA18	\$387.92	\$0.00	\$387.92	CA18	\$433.03	\$0.00	\$433.03	CA18	\$414.07	\$0.00	\$414.07	CA18	\$400.96	\$0.00	\$400.96	CA18	\$356.80	\$0.00	\$356.80
Guillermina Gaytan	42	EE	CA18	\$505.07	\$0.00	\$505.07	CA18	\$573.77	\$0.00	\$573.77	CA18	\$548.65	\$0.00	\$548.65	CA18	\$531.27	\$0.00	\$531.27	CA18	\$472.76	\$0.00	\$472.76
Rodolfo Godinez	33	EE	CA18	\$458.91	\$0.00	\$458.91	CA18	\$518.77	\$0.00	\$518.77	CA18	\$496.06	\$0.00	\$496.06	CA18	\$480.35	\$0.00	\$480.35	CA18	\$427.45	\$0.00	\$427.45
Sakina Ibrahim	35	EE	CA18	\$470.94	\$0.00	\$470.94	CA18	\$529.17	\$0.00	\$529.17	CA18	\$506.00	\$0.00	\$506.00	CA18	\$489.98	\$0.00	\$489.98	CA18	\$436.01	\$0.00	\$436.01
Sandra Loreda	27	EC	CA18	\$397.23	\$296.76	\$693.99	CA18	\$453.82	\$331.27	\$785.09	CA18	\$433.95	\$316.77	\$750.72	CA18	\$420.21	\$306.74	\$726.95	CA18	\$373.93	\$272.95	\$646.88
Ivan Luna	30	EE	CA18	\$434.08	\$0.00	\$434.08	CA18	\$491.49	\$0.00	\$491.49	CA18	\$469.97	\$0.00	\$469.97	CA18	\$455.09	\$0.00	\$455.09	CA18	\$404.97	\$0.00	\$404.97
Viridiana Mojica	29	EE	CA18	\$421.67	\$0.00	\$421.67	CA18	\$484.57	\$0.00	\$484.57	CA18	\$463.35	\$0.00	\$463.35	CA18	\$448.68	\$0.00	\$448.68	CA18	\$399.26	\$0.00	\$399.26
Miguel Morales	51	ES	CA18	\$692.83	\$757.22	\$1,450.05	CA18	\$807.61	\$883.39	\$1,691.00	CA18	\$772.25	\$844.71	\$1,616.96	CA18	\$747.79	\$817.96	\$1,565.75	CA18	\$665.43	\$727.87	\$1,393.30
Guillermina Munoz Alcala	65	EE	CA18	\$1,163.76	\$0.00	\$1,163.76	CA18	\$1,299.10	\$0.00	\$1,299.10	CA18	\$1,242.22	\$0.00	\$1,242.22	CA18	\$1,202.89	\$0.00	\$1,202.89	CA18	\$1,070.40	\$0.00	\$1,070.40
Itzel Paz Vargas	29	EE	CA18	\$421.67	\$0.00	\$421.67	CA18	\$484.57	\$0.00	\$484.57	CA18	\$463.35	\$0.00	\$463.35	CA18	\$448.68	\$0.00	\$448.68	CA18	\$399.26	\$0.00	\$399.26
Miriam Ramirez	34	EE	CA18	\$464.73	\$0.00	\$464.73	CA18	\$525.70	\$0.00	\$525.70	CA18	\$502.68	\$0.00	\$502.68	CA18	\$486.77	\$0.00	\$486.77	CA18	\$433.16	\$0.00	\$433.16
Terrie Rivera	36	EE	CA18	\$474.04	\$0.00	\$474.04	CA18	\$532.63	\$0.00	\$532.63	CA18	\$509.31	\$0.00	\$509.31	CA18	\$493.18	\$0.00	\$493.18	CA18	\$438.86	\$0.00	\$438.86
Martha Ruiz	47	EE	CA18	\$581.88	\$0.00	\$581.88	CA18	\$676.83	\$0.00	\$676.83	CA18	\$647.20	\$0.00	\$647.20	CA18	\$626.70	\$0.00	\$626.70	CA18	\$557.68	\$0.00	\$557.68
Liliana Vicente	26	FA	CA18	\$389.47	\$686.23	\$1,075.70	CA18	\$443.43	\$774.70	\$1,218.13	CA18	\$424.01	\$740.78	\$1,164.79	CA18	\$410.58	\$717.32	\$1,127.90	CA18	\$365.36	\$638.31	\$1,003.67
Estimated Monthly Totals:				\$9,455.95	\$1,740.21	\$11,196.16		\$10,740.99	\$1,989.36	\$12,730.35		\$10,270.68	\$1,902.26	\$12,172.94		\$9,945.46	\$1,842.02	\$11,787.48		\$8,850.08	\$1,639.13	\$10,489.21
Estimated Annual Totals:				\$134,354				\$152,764				\$146,075				\$141,450				\$125,871		
\$ Difference vs. Current:								\$18,410				\$11,721				\$7,096				-\$8,483		
% Difference vs Current:								13.7%				8.7%				5.3%				-6.3%		



Medical Blue Shield Plat. Access + HMO

	Current Blue Shield Platinum Access+ HMO 0/30 7/1/2023	Renewal Blue Shield Platinum Access+ HMO 0/30 7/1/2024	Alternative- Downgrade Blue Shield Gold Access+ HMO 0/35 7/1/2024	Alternative- Downgrade Blue Shield Gold Access+ HMO 500/35 7/1/2024	Alternative Carrier Anthem BC Platinum HMO 0/30 (9B30) 7/1/2024
DEDUCTIBLE					
Individual	HMO: \$0	HMO: \$0	HMO: \$0	HMO: \$500	HMO: \$0
Family	HMO: \$0	HMO: \$0	HMO: \$0	HMO: \$1,000	HMO: \$0
OUT-OF-POCKET MAX					
Individual	HMO: \$2,700	HMO: \$2,700	HMO: \$7,500	HMO: \$7,500 (includes ded)	HMO: \$2,700
Family	HMO: \$5,400	HMO: \$5,400	HMO: \$15,000	HMO: \$15,000 (includes ded)	HMO: \$5,400
PHYSICIAN SERVICES					
Office Visits	HMO: \$30/\$50	HMO: \$30/\$50	HMO: \$35/\$60	HMO: \$35/\$55 (ded waived)	HMO: \$30/\$50
Telemedicine	HMO: 0%	HMO: 0%	HMO: 0%	HMO: 0% (ded waived)	HMO: Virtual Care: 0% \$50
Preventive Care	HMO: 0%	HMO: 0%	HMO: 0%	HMO: 0% (ded waived)	HMO: 0%
Diagnostic Lab/X-Ray	HMO: \$30/\$50	HMO: \$30/\$50	HMO: \$35/\$55	HMO: \$35/\$55 (ded waived)	HMO: Office: \$10 ; Freestanding: 0%/\$10 ; OPHospital: \$15/\$30
Imaging (CT/PET scans, MRIs)	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50; OPHosp: \$250	HMO: FreeStanding: \$50 (ded waived); OPHosp: \$250 after ded	HMO: Office/Freestanding: \$100 ; OPHospital: \$250
PRESCRIPTION DRUGS					
Pharmacy Deductible	HMO: None	HMO: None	HMO: None	HMO: None	HMO: None (Select Rx)
Tier 1 (Generic Formulary)	HMO: \$5 (30-day supply)	HMO: \$5 (30-day supply)	HMO: \$20 (30-day supply)	HMO: \$15 (30-day supply)	HMO: Level 1: \$5; Level 2: \$15
Tier 2 (Preferred Brand Formulary)	HMO: \$15 (30-day supply)	HMO: \$15 (30-day supply)	HMO: \$35 (30-day supply)	HMO: \$35 (30-day supply)	HMO: Level 1: \$30; Level 2: \$40
Tier 3 (Non-Preferred Brand Formulary)	HMO: \$25 (30-day supply)	HMO: \$25 (30-day supply)	HMO: \$55 (30-day supply)	HMO: \$55 (30-day supply)	HMO: Level 1: \$50; Level 2: \$60
Tier 4 (Specialty Drugs)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: 20% up to \$250 (30-day supply)	HMO: Level 1: 30% up to \$250; Level 2: 40% up to \$250
Mail Order	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tiers 1-3: 2x retail; Tier 4: 20% up to \$500 (90-day supply)	HMO: Tier 1: 2x Retail of Level 1; Tier 2-3: 2.5x Retail of Level 1
HOSPITAL FACILITY SERVICES					
Inpatient Hospital Services	HMO: \$500/day, 4 days max	HMO: \$500/day, 4 days max	HMO: \$600/day, 5 days max	HMO: 20% after ded	HMO: \$450/day , 4 days max
Outpatient Surgery in a Hospital	HMO: \$150	HMO: \$150	HMO: \$300	HMO: \$300 after ded	HMO: \$300
Ambulatory Surgical Center	HMO: \$100	HMO: \$100	HMO: \$150	HMO: \$150 after ded	HMO: \$250
EMERGENCY SERVICES					
Emergency Room	HMO: \$250 (waived if admitted)	HMO: \$250 (waived if admitted)	HMO: \$325 (waived if admitted)	HMO: \$300 after ded (waived if admitted)	HMO: \$275 (copay waived if admitted)
Emergency Transport/Ambulance	HMO: \$150	HMO: \$150	HMO: \$175	HMO: \$175 after ded	HMO: \$150
Urgent Care	HMO: \$30	HMO: \$30	HMO: \$35	HMO: \$35 (ded waived)	HMO: \$30



Medical Blue Shield Plat. Access + HMO Rates Gallagher

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Name	Age	Dep	Current				Renewal				Alternative- Downgrade				Alternative- Downgrade				Alternative Carrier			
			Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total
			Blue Shield Platinum Access+ HMO 0/30 7/1/2023				Blue Shield Platinum Access+ HMO 0/30 7/1/2024				Blue Shield Gold Access+ HMO 0/35 7/1/2024				Blue Shield Gold Access+ HMO 500/35 7/1/2024				Anthem BC Platinum HMO 0/30 (9B30) 7/1/2024			
Norma Galeana	42	EE	CA18	\$627.02	\$0.00	\$627.02	CA18	\$680.78	\$0.00	\$680.78	CA18	\$648.79	\$0.00	\$648.79	CA18	\$627.87	\$0.00	\$627.87	CA18	\$598.67	\$0.00	\$598.67
Ernesto Gonzalez	34	EE	CA18	\$576.94	\$0.00	\$576.94	CA18	\$623.75	\$0.00	\$623.75	CA18	\$594.44	\$0.00	\$594.44	CA18	\$575.27	\$0.00	\$575.27	CA18	\$548.52	\$0.00	\$548.52
Miguel Limon	40	EE	CA18	\$607.76	\$0.00	\$607.76	CA18	\$656.63	\$0.00	\$656.63	CA18	\$625.78	\$0.00	\$625.78	CA18	\$605.60	\$0.00	\$605.60	CA18	\$577.44	\$0.00	\$577.44
Angelica Lopez	44	EE	CA18	\$653.51	\$0.00	\$653.51	CA18	\$717.77	\$0.00	\$717.77	CA18	\$684.05	\$0.00	\$684.05	CA18	\$661.99	\$0.00	\$661.99	CA18	\$631.21	\$0.00	\$631.21
Rene Martinez	26	EE	CA18	\$493.14	\$0.00	\$493.14	CA18	\$526.13	\$0.00	\$526.13	CA18	\$501.41	\$0.00	\$501.41	CA18	\$485.24	\$0.00	\$485.24	CA18	\$462.67	\$0.00	\$462.67
Marissa Munoz	64	EC	CA18	\$1,421.63	\$481.58	\$1,903.21	CA18	\$1,541.38	\$513.79	\$2,055.17	CA18	\$1,468.97	\$489.66	\$1,958.63	CA18	\$1,421.59	\$473.86	\$1,895.45	CA18	\$1,355.49	\$451.83	\$1,807.32
Angelica Ortega	50	EE	CA18	\$821.58	\$0.00	\$821.58	CA18	\$917.64	\$0.00	\$917.64	CA18	\$874.52	\$0.00	\$874.52	CA18	\$846.32	\$0.00	\$846.32	CA18	\$806.97	\$0.00	\$806.97
Vincent Severen	39	EE	CA18	\$600.05	\$0.00	\$600.05	CA18	\$648.41	\$0.00	\$648.41	CA18	\$617.94	\$0.00	\$617.94	CA18	\$598.02	\$0.00	\$598.02	CA18	\$570.21	\$0.00	\$570.21
Rosalinda Vargas	37	EC	CA18	\$592.35	\$368.41	\$960.76	CA18	\$636.08	\$393.05	\$1,029.13	CA18	\$606.19	\$374.59	\$980.78	CA18	\$586.64	\$362.51	\$949.15	CA18	\$559.37	\$345.65	\$905.02
Kathy "Micki" Webb	57	EE	CA18	\$1,123.53	\$0.00	\$1,123.53	CA18	\$1,252.12	\$0.00	\$1,252.12	CA18	\$1,193.29	\$0.00	\$1,193.29	CA18	\$1,154.81	\$0.00	\$1,154.81	CA18	\$1,101.11	\$0.00	\$1,101.11
Estimated Monthly Totals:				\$7,517.51	\$849.99	\$8,367.50		\$8,200.69	\$906.84	\$9,107.53		\$7,815.38	\$864.25	\$8,679.63		\$7,563.35	\$836.37	\$8,399.72		\$7,211.66	\$797.48	\$8,009.14
Estimated Annual Totals:				\$100,410				\$109,290				\$104,156				\$100,797				\$96,110		
\$ Difference vs. Current:								\$8,880				\$3,746				\$387				-\$4,300		
% Difference vs Current:								8.8%				3.7%				0.4%				-4.3%		



Medical Blue Shield Gold PPO

	Current Blue Shield Gold Full PPO 750/30 7/1/2023	Renewal Blue Shield Gold Full PPO 750/30 7/1/2024	Alternative- Downgrade Blue Shield Gold Full PPO 1000/35 7/1/2024	Alternative- Downgrade Blue Shield Silver Full PPO 2000/60 7/1/2024	Alternative Carrier Anthem BC Gold PPO 30/750/20% (9KFK) 7/1/2024
DEDUCTIBLE					
Individual	PPO: \$750	PPO: \$750	PPO: \$1,000	PPO: \$2,000	PPO: \$750
Family	PPO: \$1,500	PPO: \$1,500	PPO: \$2,000	PPO: \$4,000	PPO: \$2,250
OUT-OF-POCKET MAX					
Individual	PPO: \$8,150 (includes ded)	PPO: \$8,150 (includes ded)	PPO: \$8,150 (includes ded)	PPO: \$8,750 (includes ded)	PPO: \$8,200 (includes ded)
Family	PPO: \$16,300 (includes ded)	PPO: \$16,300 (includes ded)	PPO: \$16,300 (includes ded)	PPO: \$17,500 (includes ded)	PPO: \$16,400 (includes ded)
PHYSICIAN SERVICES					
Office Visits	PPO: \$30/\$55 (ded waived)	PPO: \$30/\$55 (ded waived)	PPO: \$35 /\$55 (ded waived)	PPO: \$60/\$80 (ded waived)	PPO: \$30/\$55 (ded waived)
Telemedicine	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: Virtual Care: 0%/ \$55 (ded waived)
Preventive Care	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: 0% (ded waived)	PPO: 0% (ded waived)
Diagnostic Lab/X-Ray	Freestanding: \$30/\$50 (ded PPO: waived); OPHosp: 20% after ded/\$100 (ded waived)	Freestanding: \$30/\$50 (ded PPO: waived); OPHosp: 20% after ded/\$100 (ded waived)	Freestanding: \$35 /\$50 (ded PPO: waived); OPHosp: 20% after ded/\$100 (ded waived)	FreeStanding: \$60/\$80 (ded PPO: waived); OPHosp: 35% after ded/ \$130 (ded waived)	PPO: Freestanding: 0% (ded waived)/ 20% after ded ; OPHospital: 20% after ded
Imaging (CT/PET scans, MRIs)	PPO: FreeStanding: 20% after ded; OPHosp: \$100 + 20% after ded	PPO: FreeStanding: 20% after ded; OPHosp: \$100 + 20% after ded	PPO: FreeStanding: 20% after ded; OPHosp: \$100 + 20% after ded	PPO: FreeStanding: 35% (ded waived); OPHosp: \$150 + 35% after ded	PPO: ded; OPHospital: \$100 + 20% after ded
PRESCRIPTION DRUGS					
Pharmacy Deductible	PPO: \$250/\$500 (Subject to Tiers 2-4)	PPO: \$250/\$500 (Subject to Tiers 2-4)	PPO: \$300/\$600 (Subject to Tiers 2-4)	PPO: \$350/\$700 (Subject to Tiers 2-4)	PPO: \$250/\$500 (Subject to Tiers 2-4; Select Rx)
Tier 1 (Generic Formulary)	PPO: \$10 (30-day supply)	PPO: \$10 (30-day supply)	PPO: \$10 (30-day supply)	PPO: \$25 (30-day supply)	PPO: Level 1: \$10; Level 2: \$20
Tier 2 (Preferred Brand Formulary)	PPO: \$40 (30-day supply)	PPO: \$40 (30-day supply)	PPO: \$40 (30-day supply)	PPO: \$80 (30-day supply)	PPO: Level 1: \$50; Level 2: \$60
Tier 3 (Non-Preferred Brand Formulary)	PPO: \$70 (30-day supply)	PPO: \$70 (30-day supply)	PPO: \$70 (30-day supply)	PPO: \$115 (30-day supply)	PPO: Level 1: \$90; Level 2: \$100
Tier 4 (Specialty Drugs)	PPO: 30% up to \$250 (30-day supply)	PPO: 30% up to \$250 (30-day supply)	PPO: 30% up to \$250 (30-day supply)	PPO: 30% up to \$250 (30-day supply)	PPO: Level 1: 30% up to \$250; Level 2: 40% up to \$250
Mail Order	PPO: Tiers 1-3: 2x retail; Tier 4: 30% up to \$500 (90-day supply)	PPO: Tiers 1-3: 2x retail; Tier 4: 30% up to \$500 (90-day supply)	PPO: Tiers 1-3: 2x retail; Tier 4: 30% up to \$500 (90-day supply)	PPO: Tiers 1-3: 2x retail; Tier 4: 30% up to \$500 (90-day supply)	PPO: Tier 1: 2x Retail of Level 1; Tier 2-3: 2.5x Retail of Level 1
HOSPITAL FACILITY SERVICES					
Inpatient Hospital Services	PPO: 20% after ded	PPO: 20% after ded	PPO: 20% after ded	PPO: 35% after ded	PPO: 20% after ded
Outpatient Surgery in a Hospital Ambulatory Surgical Center	PPO: \$150 + 20% after ded	PPO: \$150 + 20% after ded	PPO: \$150 + 20% after ded	PPO: \$250 + 35% after ded	PPO: \$250 + 20% after ded
EMERGENCY SERVICES					
Emergency Room	PPO: \$250/visit + 20% after ded (waived if admitted)	PPO: \$250/visit + 20% after ded (waived if admitted)	PPO: \$250/visit + 20% after ded (waived if admitted)	PPO: \$300/visit + 35% after ded (waived if admitted)	PPO: \$250/visit + 20% after ded (copay waived if admitted)
Emergency Transport/Ambulance	PPO: 20% after ded	PPO: 20% after ded	PPO: 20% after ded	PPO: 35% after ded	PPO: 20% after ded
Urgent Care	PPO: \$30 (ded waived)	PPO: \$30 (ded waived)	PPO: \$35 (ded waived)	PPO: \$60 (ded waived)	PPO: \$30 (ded waived)



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Medical Blue Shield Gold PPO Rates

				Current				Renewal				Alternative- Downgrade				Alternative- Downgrade				Alternative Carrier			
				Blue Shield				Blue Shield				Blue Shield				Blue Shield				Anthem BC			
				Gold Full PPO 750/30				Gold Full PPO 750/30				Gold Full PPO 1000/35				Silver Full PPO 2000/60				Gold PPO 30/750/20% (9KFK)			
				7/1/2023				7/1/2024				7/1/2024				7/1/2024				7/1/2024			
Name	Age	Dep	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	Area	Emp	Dep	Total	
Zunia Garcia-Cortez	30	EE	CA18	\$538.00	\$0.00	\$538.00	CA18	\$593.93	\$0.00	\$593.93	CA18	\$585.91	\$0.00	\$585.91	CA18	\$530.44	\$0.00	\$530.44	CA18	\$536.72	\$0.00	\$536.72	
Doraima Gomez	49	EE	CA18	\$786.09	\$0.00	\$786.09	CA18	\$892.73	\$0.00	\$892.73	CA18	\$880.67	\$0.00	\$880.67	CA18	\$797.30	\$0.00	\$797.30	CA18	\$806.73	\$0.00	\$806.73	
Lucy Gomez	54	ES	CA18	\$980.80	\$938.49	\$1,919.29	CA18	\$1,117.22	\$1,067.51	\$2,184.73	CA18	\$1,102.13	\$1,053.09	\$2,155.22	CA18	\$997.79	\$953.40	\$1,951.19	CA18	\$1,009.60	\$964.68	\$1,974.28	
Gloricel Grajeda	51	EE	CA18	\$858.68	\$0.00	\$858.68	CA18	\$975.93	\$0.00	\$975.93	CA18	\$962.75	\$0.00	\$962.75	CA18	\$871.61	\$0.00	\$871.61	CA18	\$881.92	\$0.00	\$881.92	
Litzi Ocampo	23	EE	CA18	\$480.79	\$0.00	\$480.79	CA18	\$523.29	\$0.00	\$523.29	CA18	\$516.22	\$0.00	\$516.22	CA18	\$467.35	\$0.00	\$467.35	CA18	\$472.88	\$0.00	\$472.88	
Pedro Perez Llorente	53	EE	CA18	\$938.49	\$0.00	\$938.49	CA18	\$1,067.51	\$0.00	\$1,067.51	CA18	\$1,053.09	\$0.00	\$1,053.09	CA18	\$953.40	\$0.00	\$953.40	CA18	\$964.68	\$0.00	\$964.68	
Carla Ramirez	42	EC	CA18	\$625.98	\$1,103.40	\$1,729.38	CA18	\$693.36	\$1,200.96	\$1,894.32	CA18	\$683.99	\$1,184.73	\$1,868.72	CA18	\$619.24	\$1,072.56	\$1,691.80	CA18	\$626.57	\$1,085.25	\$1,711.82	
Desirae Terrien	28	EE	CA18	\$503.86	\$0.00	\$503.86	CA18	\$568.81	\$0.00	\$568.81	CA18	\$561.13	\$0.00	\$561.13	CA18	\$508.01	\$0.00	\$508.01	CA18	\$514.02	\$0.00	\$514.02	
Estimated Monthly Totals:				\$5,712.69	\$2,041.89	\$7,754.58		\$6,432.78	\$2,268.47	\$8,701.25		\$6,345.89	\$2,237.82	\$8,583.71		\$5,745.14	\$2,025.96	\$7,771.10		\$5,813.12	\$2,049.93	\$7,863.05	
Estimated Annual Totals:				\$93,055				\$104,415				\$103,005				\$93,253				\$94,357			
\$ Difference vs. Current:								\$11,360				\$9,950				\$198				\$1,302			
% Difference vs Current:								12.2%				10.7%				0.2%				1.4%			



Dental HMO

		Current	Renewal	Negotiated Renewal
		Cigna DHMO P3IVX		
Rates	# EE's			
	Employee Only	\$22.84	\$23.52	\$22.84
	Employee + Spouse	\$50.92	\$52.44	\$50.92
	Employee + Child(ren)	\$46.36	\$47.75	\$46.36
	Employee + Family	\$72.86	\$75.04	\$72.86
	18			
Estimated Monthly Premium		\$439	\$452	\$439
Estimated Annual Premium		\$5,270	\$5,427	\$5,270
\$ Difference Vs. Current			\$157	\$0
% Difference Vs. Current			3.0%	0.0%
Rate Guarantee		1 year - until 2024		

Benefit Summary		
Calendar Year Deductible		None
Calendar Year Maximum Benefit		None
Office Visits (see schedule of benefits for additional costs)		\$5
Diagnostic & Preventative Services (see schedule of benefits for additional costs)		
D1110/D1120	Prophylaxis (cleaning) - adult/child (2 per year)	\$0
D0120	Periodic Oral Examination	\$0
D0210-D0330	Radiographs/Diagnostic Imaging (x-rays)	\$0
Restorative Treatment (see schedule of benefits for additional costs)		
D2391	White Filling (posterior)	\$35
Endodontics (see schedule of benefits for additional costs)		
D3330	Root Canal - Molar (excl. final restoration)	\$135
Periodontics (see schedule of benefits for additional costs)		
D4261	Periodontal Osseous Surgery (gum disease)	\$160
D4342	Periodontal Scaling & Root Planing (gum disease)	\$17
Removable Prosthodontics (see schedule of benefits for additional costs)		
D5110-D5120	Complete Denture - maxillary or mandibular	\$120
D5211-D5212	Partial Denture - maxillary or mandibular	\$120
Crowns/Fixed Bridges - Per Unit (see schedule of benefits for additional costs)		
D6240	Pontic - porcelain fused to a high noble metal	\$100
D6750	Crown - porcelain fused to high noble metal	\$100
Oral Surgery (see schedule of benefits for additional costs)		
D7220	Surgery to Remove Impacted Tooth (soft tissue)	\$25
Orthodontics (see schedule of benefits for specifics)		
	Comprehensive orthodontic treatment of the adolescent dentition	\$1,484
	Comprehensive orthodontic treatment of the adult dentition	\$1,988



Dental Low PPO

		Current	Renewal	Negotiated Renewal
		Cigna DPPO Low Plan		
Rates	# EE's			
Employee Only	10	\$42.95	\$44.88	\$42.95
Employee + Spouse	1	\$96.77	\$101.12	\$96.77
Employee + Child(ren)	3	\$88.03	\$91.99	\$88.03
Employee + Family	1	\$138.79	\$145.04	\$138.79
	15			
Estimated Monthly Premium		\$929	\$971	\$929
Estimated Annual Premium		\$11,150	\$11,652	\$11,149
\$ Difference Vs. Current			\$502	\$0
% Difference Vs. Current			4.5%	0.0%
Rate Guarantee		1 year - until 2024		

Benefit Summary	In-Network	Out-of-Network
Calendar Year Deductible (Waived for Preventive?)	Yes	Yes
Individual	\$50	\$50
Family	\$150	\$150
Calendar Year Maximum Per Person	\$1,000 + Progressive Max	
Diagnostic & Preventive	0%	0%
Exams		
Cleanings		
X-Rays		
Regular Restorative Services	10%	10%
Fillings, Simple Surgery		
Endodontics (Root Canals)		
Periodontics (Gum Disease)		
Major Services	40%	40%
Crowns		
Bridges and Dentures		
Orthodontics Lifetime Maximum	Not Covered	
Orthodontics (up to dependent age limit)	Not Covered	Not Covered
Reimbursement Schedule	Fee Schedule	MAC

Cigna: Progressive Max benefit allows portions of unused Plan Max dollars to roll over each plan year when members utilize preventive screening services.



Dental High PPO

		Current	Renewal	Negotiated Renewal
		Cigna DPPO High Plan		
Rates	# EE's			
Employee Only	18	\$63.44	\$66.29	\$63.44
Employee + Spouse	4	\$141.46	\$147.83	\$141.46
Employee + Child(ren)	1	\$128.79	\$134.59	\$128.79
Employee + Family	4	\$202.40	\$211.51	\$202.40
	27			
Estimated Monthly Premium		\$2,646	\$2,765	\$2,646
Estimated Annual Premium		\$31,754	\$33,183	\$31,754
\$ Difference Vs. Current			\$1,429	\$0
% Difference Vs. Current			4.5%	0.0%
Rate Guarantee		1 year - until 2024		

Benefit Summary	In-Network	Out-of-Network
Calendar Year Deductible (Waived for Preventive?)	Yes	Yes
Individual	\$50	\$50
Family	\$150	\$150
Calendar Year Maximum Per Person	\$2,000 + Progressive Max	
Diagnostic & Preventive	0%	0%
Exams		
Cleanings		
X-Rays		
Regular Restorative Services	10%	10%
Fillings, Simple Surgery		
Endodontics (Root Canals)		
Periodontics (Gum Disease)		
Major Services	40%	40%
Crowns		
Bridges and Dentures		
Orthodontics Lifetime Maximum	\$2,000	
Orthodontics (up to dependent age limit)	50% Adult & Child	50% Adult & Child
Reimbursement Schedule	Fee Schedule	UCR 90th Percentile

Cigna: Progressive Max benefit allows portions of unused Plan Max dollars to roll over each plan year when members utilize preventive screening services.



Vision

		Current	Renewal
		EyeMed Insight Plan H Option 1	
Rates	# EE's		
Employee Only	52	\$6.28	\$6.28
Employee + Spouse	7	\$11.94	\$11.94
Employee + Child(ren)	3	\$12.58	\$12.58
Employee + Family	3	\$18.48	\$18.48
	65		
Estimated Monthly Premium		\$503	\$503
Estimated Annual Premium		\$6,040	\$6,040
\$ Difference Vs. Current			\$0
% Difference Vs. Current			0.0%
Rate Guarantee		3 years - until 2027	

Benefits Summary	In-Network	Out-of-Network
Exams		
Vision Exam	\$10 Co-pay	Reimbursement up to \$40
Lenses		
Single Vision	\$25 Co-pay	Reimbursement up to \$30
Lined Bifocal	\$25 Co-pay	Reimbursement up to \$50
Lined Trifocal	\$25 Co-pay	Reimbursement up to \$70
Frames	\$130 allowance + 20% discount	Reimbursement up to \$91
Contact Lenses (in lieu of glasses)		
Medically necessary	Covered in Full	Reimbursement up to \$210
Elective	\$130 allowance	Reimbursement up to \$130
Frequency - Exam/Lenses/Frames	12/12/24	



Basic Life/AD&D

	Current/Renewal Mutual of Omaha Life/AD&D	Alternative The Hartford Life/AD&D	Alternative SunLife Life/AD&D
Enrolled Employees	86	86	86
Current volume:	\$4,300,000	\$4,300,000	\$4,300,000
Life rate/1,000:	\$0.050	\$0.050	\$0.079
AD&D rate/1,000:	\$0.020	\$0.016	\$0.024
Estimated Monthly Premium	\$301	\$284	\$443
Estimated Annual Premium	\$3,612	\$3,406	\$5,315
\$ Difference Vs. Current	\$0	-\$206	\$1,703
% Difference Vs. Current	0.0%	-5.7%	47.1%
Rate Guarantee	2 years - until 2026	2 years - until 2026	2 years - until 2026
Benefit Summary			
Benefit Amount	\$50,000	\$50,000	\$50,000
Age Reduction	Benefit reduces by: 35% at age 65 50% at age 70 Benefit terminates at retirement.	Benefit reduces by: 35% at age 65 50% at age 70 Benefit terminates at retirement.	Benefit reduces by: 35% at age 65 50% at age 70 Benefit terminates at retirement.



Voluntary Life/AD&D

	Current/Renewal Mutual of Omaha Voluntary Life/AD&D		Alternative The Hartford Voluntary Life/AD&D		Alternative SunLife Voluntary Life/AD&D	
Participation	30 enrolled		36% of eligible employees		20% of eligible employees	
Coverage Amount (Employee)	\$10,000 increments up to 5x annual salary or \$250,000		\$10,000 increments up to 5x annual salary or \$250,000		\$10,000 increments up to 5x annual salary or \$250,000	
Coverage Amount (Spouse)	\$5,000 increments up to 100% of Employee's coverage amount or \$250,000		\$5,000 increments up to 100% of Employee's coverage amount or \$250,000		\$5,000 increments up to 100% of Employee's coverage amount or \$250,000	
Coverage Amount (Child)	\$2,000 increments up to \$10,000		\$2,000 increments up to \$10,000		\$2,000 increments up to \$10,000	
Guaranteed Issue	Employee: \$100,000 Spouse: \$25,000 Child: \$10,000		Employee: \$100,000 Spouse: \$25,000 Child: \$10,000		Employee: \$100,000 Spouse: \$25,000 Child: \$10,000	
Rate Guarantee	2 years - until 2026		2 years - until 2026		2 years - until 2026	
Benefit Reduction:	Benefit reduces by: 35% at age 65 50% at age 70 Benefits terminate at retirement		Benefits Reduce by: 35% at age 65 50% at age 70 Coverage terminates at retirement		Benefits Reduce by: 35% at age 65 50% at age 70 Coverage terminates at retirement	
	Age Band	Employee & Spouse Rate per \$1,000	Age Band	Employee & Spouse Rate per \$1,000	Age Band	Employee & Spouse Rate per \$1,000
	Under 25	\$0.050	Under 25	\$0.050	Under 25	\$0.050
	25 - 29	\$0.050	25 - 29	\$0.050	25 - 29	\$0.050
	30 - 34	\$0.060	30 - 34	\$0.060	30 - 34	\$0.060
	35 - 39	\$0.070	35 - 39	\$0.070	35 - 39	\$0.070
	40 - 44	\$0.110	40 - 44	\$0.110	40 - 44	\$0.110
	45 - 49	\$0.190	45 - 49	\$0.190	45 - 49	\$0.190
	50 - 54	\$0.310	50 - 54	\$0.310	50 - 54	\$0.310
	55 - 59	\$0.490	55 - 59	\$0.490	55 - 59	\$0.490
	60 - 64	\$0.760	60 - 64	\$0.760	60 - 64	\$0.760
	65 - 69	\$1.370	65 - 69	\$1.370	65 - 69	\$1.370
	70 - 74	\$2.460	70 - 74	\$2.460	70 - 74	\$2.460
	75 - 79	\$4.050	75 - 79	\$4.050	75 - 79	\$8.200
	80 - 99	\$8.200	80 - 99	\$4.050	80 - 99	\$8.200
	Child(ren) Life Rate:	\$0.010	Child(ren) Life Rate:	\$0.010	Child(ren) Life Rate:	\$0.010
	Optional AD&D Rate per \$1,000		Optional AD&D Rate per \$1,000		Optional AD&D Rate per \$1,000	
	Employee:	\$0.040	Employee:	\$0.040	Employee:	\$0.040
	Spouse:	\$0.040	Spouse:	\$0.040	Spouse:	\$0.040
	Child:	\$0.040	Child:	\$0.040	Child:	\$0.040



Long Term Disability

	Current/Renewal	Alternative	Alternative
	Mutual of Omaha Long Term Disability	The Hartford Long Term Disability	SunLife Long Term Disability
Enrolled Employees:	86	86	86
Monthly Covered Payroll:	\$376,304	\$376,304	\$376,304
Rate/\$100 monthly payroll:	\$0.100	\$0.100	\$0.085
Estimated Monthly Premium	\$376	\$376	\$320
Estimated Annual Premium	\$4,516	\$4,516	\$3,838
\$ Difference Vs. Current	\$0	\$0	-\$677
% Difference Vs. Current	0.0%	0.0%	-15.0%
Rate Guarantee	2 years - until 2026	2 years - until 2026	2 years - until 2026
Benefit Summary			
Percentage of Monthly Earnings	60%	60%	60%
Maximum Monthly Benefit	\$6,000	\$6,000	\$6,000
Elimination Period	1 Year	1 Year	1 Year
Maximum Benefit Duration	SSNRA	SSNRA	SSNRA
Pre-existing Condition	3 months prior / 12 months enrolled	3 months prior / 12 months enrolled	3 months prior / 12 months enrolled
Employee Assistance Program?	Yes: 3 face-to-face visits	Yes: 3 face-to-face visits	Yes: 3 face-to-face visits



Voluntary Short Term Disability

	Current/Renewal	Alternative	Alternative
	Mutual of Omaha	The Hartford	SunLife
	Voluntary Short Term Disability	Voluntary Short Term Disability	Voluntary Short Term Disability
Rate/\$10 of weekly benefit:	\$0.800	\$0.810	\$1.350
Rate Guarantee	1 year - until 2025	2 years - until 2026	2 years - until 2026
Benefit Summary			
Participation	14 enrolled	17% of eligible employees	25% of eligible employees
Percentage of Weekly Earnings	20%	20%	20%
Maximum Weekly Benefit	\$1,200	\$1,200	\$1,200
Elimination Period (illness/injury)	7 days	7 days	7 days
Maximum Benefit Duration	51 weeks	52 weeks	51 weeks
Pre-existing Condition	3 months prior / 6 months enrolled	3 months prior / 12 months enrolled	3 months prior / 12 months enrolled
State Disability Offset	None	None	None



Voluntary Accident

	Current/Renewal	Alternative	Alternative
	Mutual of Omaha	The Hartford	SunLife
	Accident Plan	Accident Plan	Accident Plan
Rates:			
Employee only	\$16.88	\$16.09	\$15.33
Employee + Spouse	\$22.18	\$25.39	\$25.73
Employee + Child	\$26.24	\$27.39	\$30.86
Employee + Family	\$31.92	\$42.89	\$41.26
Rate Guarantee	2 years - until 2026	3 years - until 2027	3 years - until 2027
Benefit Summary			
Participation	8 enrolled	10% of eligible employees	5 enrolled of eligible employees
Coverage Type	24-hour on/off job	24-hour on/off job	24-hour on/off job
Wellness Benefit	\$50 per person per calendar year	\$50 per person per calendar year	\$50 per person per calendar year
Hospital Confinement (Accident)	\$1,500/admit \$300/day (365 day max)	\$2,500/admit \$750/day (365 day max)	\$1,500/admit \$300/day (365 day max)
Accident Coverage	X-Ray: \$75 Follow-Up PCP Visit: \$100 Physical Therapy: \$50 Ambulance: \$2,000	X-Ray: \$200 Follow-Up PCP Visit: \$200 Physical Therapy: \$125 Ambulance: \$1,250	X-Ray: \$100 Follow-Up PCP Visit: \$100 Physical Therapy: \$50 Ambulance: \$400



Voluntary Critical Illness

	Current/Renewal Mutual of Omaha Voluntary Critical Illness	Alternative The Hartford Voluntary Critical Illness	Alternative SunLife Voluntary Critical Illness
Participation	10 enrolled	10% of eligible employees	15% of eligible employees
Coverage Amount (Employee)	\$10,000 - \$30,000	\$10,000 - \$20,000	\$5,000 - \$20,000
Coverage Amount (Spouse)	50% of employee election	50% of employee election	\$5,000 - \$20,000 (100% of employee election)
Coverage Amount (Child)	50% of employee election; up to \$10,000	50% of employee election	\$2,500 - \$10,000 (50% of employee election)
Employee Guaranteed Issue	\$30,000	\$20,000	\$20,000
Rate Guarantee	2 years - until 2026	3 years - until 2027	3 years - until 2027
Additional Benefits:			
Wellness Benefit	\$75 per member per calendar year	\$50 per member per calendar year	\$50 per member per calendar year
Pre-Existing Condition Period	None	None	12 months prior / 12 months enrolled
Benefit Category	Invasive Cancer, Bone Marrow Transplant, Carcinoma In Situ, Heart Attack, Heart Transplant/Placement, Heart Valve Surgery, Coronary Artery Bypass, Aortic Surgery, Stroke, ALS, Advanced Alzheimer's Disease, Advanced Parkinson's Disease, Major Organ Transplant/Placement, End-Stage Renal Failure, Acute Respiratory Distress Syndrome. Childhood/Developmental Category: Cerebral Palsy, Structural Congenital Defects, Genetic Disorders, Congenital Metabolic Disorders, and Type 1 Diabetes	Cancer & Benign Tumor, Heart/Vascular, Major Organ, Neurological Conditions, Infectious Conditions, Functional Loss & Catastrophic Conditions. Childhood/Developmental Category: Cerebral Palsy, Congenital Metabolic Disorder, Congenital Heart Disease, Genetic Disorder, Structural Congenital Defect, Type 1 Diabetes	Heart Attack, Stroke, Major Organ Failure, End-Stage Kidney Disease, Coronary Artery Bypass Graft, Angioplasty, Invasive Cancer, Non-Invasive Cancer, Skin Cancer, Benign Brain Tumor, Paralysis, Coma, Severe Burns, ALS, Advanced Alzheimer's, Advanced Parkinson's Childhood/Developmental Category: Down Syndrome, Cerebral Palsy, Cystic Fibrosis, Cleft Lip/Palate, Type 1 Diabetes Mellitus, Muscular Dystrophy, Complex Congenital Heart Disease and Spina Bifida

Monthly Premium Rates for \$10,000 Coverage Amount	
Age Band	EE/Spouse
Under 25	\$3.79
25-29	\$4.56
30-34	\$5.61
35-39	\$6.98
40-44	\$9.45
45-49	\$13.60
50-54	\$18.67
55-59	\$25.42
60-64	\$34.52
65-69	\$73.82
70-74	\$101.43
75-79	\$135.78
80+	\$172.17

Monthly Premium Rates for \$10,000 Coverage Amount	
Age Band	EE/Spouse
Under 25	\$4.40
25-29	\$5.40
30-34	\$6.50
35-39	\$8.00
40-44	\$10.30
45-49	\$15.00
50-54	\$19.80
55-59	\$25.70
60-64	\$34.80
65-69	\$46.80
70-74	\$60.60
75-79	\$75.90
80+	\$91.20

Monthly Premium Rates for \$10,000 Coverage Amount	
Age Band	EE/Spouse
Under 25	\$6.40
25-29	\$6.90
30-34	\$8.20
35-39	\$11.00
40-44	\$15.20
45-49	\$20.90
50-54	\$30.20
55-59	\$39.60
60-64	\$47.30
65-69	\$62.00
70-74	\$82.40
75-79	\$112.50
80+	\$112.50
CH Rate	\$1.20



Voluntary Legal/ID Theft

Rates:	Current/Renewal		
	Legal Shield		
	Legal Shield & IDShield		
	Legal Plan	ID Shield	Combination Package
Employee only	\$18.95	\$8.45	\$24.40
Employee + Family	\$18.95	\$15.95	\$31.90

Benefit Summary	
Consultation & Advice	Unlimited phone calls and letters
Document Preparation	Covered
Will & Estate Planning	Covered
Family Law	Covered
Debt Matters	Covered
Real Estate Matters	Covered
Traffic & Criminal Matters	Covered
Civil Litigation Defense	Covered
24/7/365 Emergency Access	Covered
Dedicated Provider Law Firms (Nationwide-Closed Panel-Attorney Network)	Yes - Employees call their resident state, Dedicated Provider Law Firm directly and toll free with no gate-keeper. Dedicated Provider Law Firms are pre-paid on a per capita basis for each member in their state and they're paid whether the member uses the services or not. There are no claim forms and no reimbursement forms to fill out.
Identity Theft	Full Service Restoration Privacy Monitoring Security Monitoring (SSN, up to 10 credit cards, up to 10 bank accounts)

Legal Shield: No participation requirement. Family Plan: • The member • The member's spouse/domestic partner • Never-married dependent children under age 26 living at home • Dependent children under age 18 for whom the member is legal guardian • Never married, dependent, children who are full-time college students up to age 26 • Physically or mentally disabled children living at home



Voluntary Pet Insurance

Rate	Current/Renewal
	ASPCA
	Pet Insurance^{2,3,4,5}
	<i>Based on breed, age, zip code and plan. No Payroll Deductions, members sign up directly with vendor.</i>

Benefit Summary	
Annual Deductible	Customizable: \$100, \$250 or \$500
Reimbursement Level	Customizable: 90%, 80% or 70%
Maximum Annual Benefit	Customizable: \$5,000, \$10,000, \$15,000, \$20,000, Unlimited
Accidents, Common Illnesses, Surgery, X-rays	Yes
Office/Vet Exam ¹	No
Spay/Neuter ¹	No
Chronic Condition Coverage	Yes
Hereditary Conditions	Yes
Freedom to Use Any Vet	Yes
Pre-Existing Conditions	No

1. These Preventive Coverages are covered if you add-on a Wellness Endorsement. You have 2 options, Basic which is \$9.95/month or Prime \$24.95/month. You also have the option to choose neither. Plans are customizable.
2. Some additional coverages are behavioral issues, dental disease, and alternative therapies
3. Dogs and cats must be 8 weeks and up to be eligible
4. 24/7 pet help line staffed by veterinary experts including technicians and veterinarians (call, email and chat options) called whiskerDocs
5. How it Works: (1) Visit any vet, specialist, or emergency clinic (2) Pay your vet bill (3) Submit your claim online (4) Receive reimbursement through direct deposit or in the mail



Renewal Timeline and Next Steps

	Activity	Date Complete	Responsibility
1	Renewal Preparation		
	Identify Goals for Upcoming Plan Year	Completed	OCEAA + Gallagher
	Review Inputs Impacting Renewals	Completed	OCEAA + Gallagher
	Discuss Current Services Provided	Completed	OCEAA + Gallagher
2	Renewals/Claims Data Review		
	Request Renewal & Claims Data from Carriers	Completed	Gallagher
	Receive Renewal & Claims Data from Carriers	Completed	Gallagher
3	RFP		
	Census Update	Completed	OCEAA
	RFP to Marketplace	Completed	Gallagher
	Due Date for Carrier RFP Response	Completed	Gallagher
4	Renewal Proposal & Decisions		
	Develop Renewal Proposal with Carrier Finalists	Completed	Gallagher
	Renewal Proposal Meeting	5/8	OCEAA + Gallagher
	Final Decisions	Week of 5/13	OCEAA
5	Open Enrollment/Renewal Implementation		
	Carrier and Vendor Notification	Week of 5/13	Gallagher
	Notification to Employees	Week of 5/13	OCEAA + Gallagher
	Open Enrollment Guide Draft	Week of 5/13	Gallagher
	Open Enrollment Guide Approval	Week of 5/13	OCEAA
	Enrollment System Setup/Update	Week of 5/13	OCEAA + Gallagher
	Open Enrollment Meetings/Webinars	5/20 – 5/31 (2 weeks)	OCEAA + Gallagher
	Enrollment Submission to Carriers	Week of 6/3	OCEAA + Gallagher
6	New Plan Year		
	SPD Renewal & Update	July	OCEAA
	Form 5500 Filing	N/A	OCEAA + Gallagher



Gallagher

Insurance | Risk Management | Consulting

Appendix



Marketing Summary

Medical	Carrier	Response	Comment
	Aetna	Quoted	Not Competitive
	Anthem	Quoted	Presented
	Blue Shield	<i>Incumbent</i>	<i>Presented</i>
	Health Net	Quoted	Not Competitive
	Kaiser	<i>Incumbent</i>	<i>Presented</i>
	UHC	Quoted	Not Competitive

Dental	Carrier	Response	Comment
	Cigna	<i>Incumbent</i>	<i>Presented</i>

Vision	Carrier	Response	Comment
	Eyemed	<i>Incumbent</i>	<i>Presented</i>

LADD/VLADD/LTD/VSTD	Carrier	Response	Comment
	Guardian	Denied to quote	Not Competitive
	Lincoln	Denied to quote	Not Competitive
	MetLife	Denied to quote	Not Competitive
	Mutual of Omaha	<i>Incumbent</i>	<i>Presented</i>
	Principal	Denied to quote	Not Competitive
	Sunlife	Quoted	Presented
	The Hartford	Quoted	Presented

VACC/VCI	Carrier	Response	Comment
	Guardian	Denied to quote	Not Competitive
	Lincoln	Denied to quote	Not Competitive
	MetLife	Denied to quote	Not Competitive
	Mutual of Omaha	<i>Incumbent</i>	<i>Presented</i>
	Principal	Denied to quote	Not Competitive
	Sunlife	Quoted	Presented
	The Hartford	Quoted	Presented

Voluntary Legal/ID Theft	Carrier	Response	Comment
	LegalShield	<i>Incumbent</i>	<i>Presented</i>

Voluntary Pet Insurance	Carrier	Response	Comment
	ASPCA	<i>Incumbent</i>	<i>Presented</i>



Compensation Disclosure

OCEAA

Compensation Disclosure

Renewal Effective July 1, 2024

Presented by Gallagher Benefit Services - May 8, 2024

Along with the AM Best rating, this exhibit also serves as disclosure of our estimated fees and/or commissions related to OCEAA's Group Health & Welfare Plan(s) and any relationships or agreements Gallagher Benefit Services, Inc. ("GBS") has with the insurance companies involved in this renewal. GBS, as agent of record, will receive the following estimated commissions expressed as a percentage of gross premium payments, or fees as agreed upon by OCEAA.

Line of Coverage	Insurance Company	Commission ¹	AM Best Rating
Medical	Blue Shield of California (06181)	5%	
Medical	Kaiser Permanente (use Kaiser Foundation Health Plan) (68528)	5%	
Medical	Anthem Insurance Companies, Inc. (00607)	5%	
Dental	CIGNA (Connecticut General Life Insurance Co.) (06266)	10%	
Vision	EyeMed Vision Care (Fidelity Security Life Ins. Co.) (07426)	10%	
Legal plan	Legal Shield	13.8%	
ID Theft	Legal Shield	16%	
Life/AD&D, Voluntary Life/AD&D, Long Term Disability, Voluntary Short-Term Disability, Voluntary Critical Illness, Voluntary Accident	Mutual of Omaha Insurance Co. (07369)	10%	A+
Life/AD&D, Long Term Disability, Voluntary Short-Term Disability, Voluntary Critical Illness, Voluntary Accident	Sun Life and Health Insurance Co. (U.S.) (008474)	10%	A+
Voluntary Life/AD&D	Sun Life and Health Insurance Co. (U.S.) (008474)	15%	A+
Life/AD&D, Voluntary Life/AD&D, Long Term Disability, Voluntary Short-Term Disability, Voluntary Critical Illness, Voluntary Accident	Hartford Life Insurance Co. (06518)	10%	A+

¹ Commissions include all commissions/fees paid to GBS that are attributable to a contract or policy between a plan and an insurance company, or insurance service. This includes indirect fees that are paid to GBS paid by a third party, and includes, among other things, the payment of "finders' fees" or other fees to GBS for a transaction or service involving the plan.

A.M. BEST Rating Classifications

A++, A+	Superior	B, B-	Fair	X	\$500-750m	XIII	\$1.25-1.5b
A, A-	Excellent	C++, C+	Marginal	XI	\$750m-1b	XIV	\$1.5-2b
B++, B+	Good	C, C-	Weak	XII	\$1-1.25b	XV	\$2b +

The A.M. Best Guide is a resource the insurance industry uses to determine the financial stability of an insurance company. A copy of the Best's Guide report on the insurance companies quoted is available for your review. While we strive to be certain that your insurance is placed with a reputable, highly rated insurance company, we have no way of guaranteeing the financial accuracy of the Best's Guide or the financial stability of any insurance company. For these reasons, we recommend that you take into account the financial stability of all the insurance companies prior to making your selection as to who will write your insurance. For non-health insurance carriers or markets (such as Life, AD&D, STD, LTD, LTC, Universal Life, Term Life, Critical Illness, Cancer, Hospital Indemnity, Sickness, Accident, Mini-Med, Accident, Auto/Home, Legal, and Pet Insurance), the standard measure utilized by GBS to evaluate the financial condition of insurance markets is the ratings and financial size categories assigned by A.M. Best Company, Inc. A.M. Best is the oldest independent rating agency in the world to report on the financial strength of insurance companies.



Disclosure Notices

OCEAA

Disclosure Notices

Renewal Effective July 1, 2024

Presented by Gallagher Benefit Services – May 8, 2024

IMPORTANT: This proposal is an outline of the coverages proposed by the carrier(s), based on information provided by your company. It does not include all the terms, coverages, exclusions, limitations, and conditions of the actual contract language. The policies and contracts themselves must be read for those details. Policy forms for your reference will be made available upon request. This analysis is for illustrative purposes only, and is not a guarantee of future expenses, claims costs, managed care savings, etc. There are many variables that can affect future health care costs including utilization patterns, catastrophic claims, changes in plan design, health care trend increases, etc. This analysis does not amend, extend, or alter the coverage provided by the actual insurance policies and contracts.

While GBS does not guarantee the financial viability of any health insurance carrier or market, it is an area we recommend that clients closely scrutinize when selecting a health insurance carrier or HMO. There are a number of rating agencies that can be referred to including, A.M. Best, Fitch, Moody's, Standard & Poor's, and Weiss Ratings (TheStreet.com). Generally, agencies that provide ratings of U.S. Health Insurers, including traditional insurance companies and other managed care (e.g., HMO) organizations, reflects their option based on a comprehensive quantitative and qualitative evaluation of a company's financial strength, operating performance and market profile. However, these ratings are not a warranty of an insurer's current or future ability to meet its contractual obligations.

This proposal [analysis, report, etc.] is an outline of the coverages proposed by the carrier(s), based on information provided by your company. It does not include all of the terms, coverages, exclusions, limitations, and conditions of the actual contract language. The policies and contracts themselves must be read for those details. Policy forms for your reference will be made available upon request.

This analysis is for illustrative purposes only, and is not a guarantee of future expenses, claims costs, managed care savings, etc. There are many variables that can affect future health care costs including utilization patterns, catastrophic claims, changes in plan design, health care trend increases, etc. This analysis does not amend, extend, or alter the coverage provided by the actual insurance policies and contracts. Please see your policy or contact us for specific information or further details in this regard.

The intent of this analysis is to provide you with general information regarding the status of, and/or potential concerns related to, your current employee benefits environment. It does not necessarily fully address all of your specific issues. It should not be construed as, nor is it intended to provide, legal advice. Questions regarding specific issues should be addressed by your general counsel or an attorney who specializes in this practice area.



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Area Corporate Counsel

Legal compliance consulting and education



2024-25 LCAP Plan

May 8, 2024 - Board of Directors

Mike Limón, Executive Director

Pedro Llorente, School Director

Timeline (Charter & Budgets)

[Charter Renewal Petition for the Orange County Educational Arts Academy
A California Public Charter School](#)

July 1, 2020 – June 30, 2027⁵

Refer to page 22

[ORANGE COUNTY EDUCATIONAL ARTS ACADEMY BOARD OF DIRECTORS - Charter Term Extension
Board Resolution 2021-01](#)

Project Management Tool Research:

1. [DTS](#)
2. [Edapt – School Leaders' AI Sidekick](#)
3. CDE Rolled out their ETemplate on “MyCDEConnect” but we have learned is not working well

State Priorities

Conditions of Learning	Engagement	Pupil Outcomes
Priority 1. Basics	Priority 3. Parental Involvement	Priority 4. Pupil Achievement
Priority 2. State Standards	Priority 5. Pupil Engagement	Priority 8. Other Pupil Outcomes
Priority 7. Course Access	Priority 6. School Climate	



California School
DASHBOARD

[LINK](#)

SCHOOL PERFORMANCE OVERVIEW

Orange County Educational Arts Academy

Generate PDF Report

View Additional Reports

2023

Explore the performance of Orange County Educational Arts Academy under California's Accountability System.

Chronic Absenteeism



Yellow

Suspension Rate



Orange

English Learner Progress



Orange

English Language Arts



Orange

Mathematics



Yellow

Basics: Teachers,
Instructional Materials,
Facilities

STANDARD MET

Implementation of Academic
Standards

STANDARD MET

Parent and Family
Engagement

STANDARD MET

Local Climate Survey

STANDARD MET

Access to a Broad Course of
Study

STANDARD MET

Goal #1:

OCEAA ensures student access to qualified teachers, Special Education, a broad course of study, facilities in good standing, standards-aligned instructional materials, technology and physical wellness that supports their success.

(State Priorities: 1, 7)

	2023-24 LCAP	Mid-Year Progress
Actions	11	11 Full
Expenditures	\$9,599,54	\$4,310,021

Action #	Title	Total Funds	Actual Expenses	% Spent	\$ Remaining	% Remaining
1.01	Staffing – Certificated	\$4,600,729	\$2,010,624	44%	\$2,590,105	56%
1.02	Staffing – Classified	\$1,891,414	\$1,043,769	55%	\$847,645	45%
1.03	Staffing – Paraprofessionals	\$1,144,724	\$325,894	28%	\$818,830	72%
1.04	Additional Special Education Services	\$205,554	\$59,771	29%	\$145,783	71%
1.05	Standards-aligned Instructional Materials	\$139,050	\$43,448	31%	\$95,602	69%
1.06	Facilities & Maintenance	\$1,038,170	\$592,760	57%	\$445,410	43%
1.07	Nutrition & Wellness	\$340,000	\$151,110	44%	\$188,890	56%
1.08	Technology – Teachers & Classrooms	\$40,000	\$19,925	50%	\$20,075	50%
1.09	Technology – Students	\$55,000	\$14,082	26%	\$40,918	74%
1.10	Data Management/Student Information System, Local Assessments (State-verified data), & Digital Curriculum/materials	\$144,903	\$48,641	34%	\$96,262	66%
1.11	Integration of Technology	0				

Goal #2:

OCEAA teachers effectively use data, student engaged assessment, and language acquisition strategies to ensure students achieve academic excellence in Spanish and English. (State Priorities: 2, 4, 8)

	2023-24 LCAP	Mid-Year Progress
Actions	5	4 Full/ 1 Planned
Expenditures	\$71,300	\$61,917

Action #	Title	Total Funds	Actual Expenses	% Spent	\$ Remaining	% Remaining
2.01	Teacher Leadership	Captured in 2.2				
2.02	Professional Development	\$71,300	\$57,416	81%	\$13,884	19%
2.03	Professional Development – English Learners	Captured in 2.2				
2.04	Multi-tiered System of Supports (MTSS)	0	0		0	
2.05	Support for English Learners & Families	0	\$4,501		-\$4,501	

Goal #3:

All OCEAA students create complex, authentic work that demonstrates a high level of craftsmanship.

(State Priorities: 2, 5, 8)

	2023-24 LCAP	Mid-Year Progress
Actions	2	2 Full
Expenditures	\$130,050	\$105,111

Action #	Title	Total Funds	Actual Expenses	% Spent	\$ Remaining	% Remaining
3.01	EL Education Partnership	\$52,800	\$53,600	102%	-\$800	-2%
3.02	Student Fieldwork & Service Learning	\$77,250	\$51,511	67%	\$25,739	33%

Goal #4:

All OCEAA students develop strong character and crew spirit to become effective learners, ethical people and culturally competent leaders who contribute to a better world.
(State Priorities: 5, 6, 8)

	2023-24 LCAP	Mid-Year Progress
Actions	5	4 Full/ 1 Planned
Expenditures	\$18,800.00	\$10,308

Action #	Title	Total Funds	Actual Expenses	% Spent	\$ Remaining	% Remaining
4.01	Crew Culture – Assemblies & Recognitions	\$7,000	\$1,873	27%	\$5,127	73%
4.02	College-awareness & engagement	\$1,500	\$0	0%	\$1,500	100%
4.03	Bilingual Counseling Support	Captured in 1.01				
4.04	Support for Families Experiencing Homelessness (McKinney-Vento)	\$2,800	\$1,235	44%	\$1,564	56%
4.05	Attendance Tracking and Intervention	\$7,500	\$7,200	96%	\$300	4%
4.06	Extracurricular Clubs & Activities	Captured in 2.02				



Goal #5:

OCEAA staff engage families in the life of the school, developing strong partnerships that support the well being of students and prepare them for entering a college preparatory high school program.

(State Priorities: 3)

	2023-24 LCAP	Mid-Year Progress
Actions	9	6 Full/ 3 Planned
Expenditures	\$13,550.00	\$4,716



Action #	Title	Total Funds	Actual Expenses	% Spent	\$ Remaining	% Remaining
5.01	Parent Involvement and Participation in the Life of the School	\$3,000	0	0%	\$3,000	100%
5.02	Parent Engagement Supports	\$500	\$584	117%	-\$84	-17%
5.03	Student Led Conferences (SLCs)	\$0				
5.04	Parent Programming: Adult Crew	\$2,600	\$0	0%	\$2,600	100%
5.05	Parent Programming: technological proficiency and college preparatory culture	\$500	\$0	0%	\$500	100%
5.06	Parent Programming - Physical and Socio-Emotional Wellness	\$2,500	\$0	0%	\$2,500	100%
5.07	Parent Programming - Supporting Student Academic Development	\$500	\$0	0%	\$500	100%
5.08	Parent Programming - High School Information Sessions	\$750	\$950	127%	-\$200	-27%
5.09	Home/School Communications	\$3,200	\$3,182	99%	\$18	1%



Math:

- Focusing on math facts fluency
- Teaching how to differentiate on word problems what parts of the problem that are needed versus the parts that aren't (use highlighters etc.)
- Focus on math vocabulary - teaching it specifically
- Follow up with teachers after test prep activities to target challenge areas for each student
- PDs provided by SELPA for academic intervention strategies
- Use of SDAI strategies
- Visual supports
- Manipulatives
- Incorporate ASL
- Focus on collaboration with general education teachers to model small group instruction using individualized interventions and IEP accommodations
- Provision of materials to general education teachers as feasible

ELs:

- Use of Learning Center for doing independent work to support increased focus and reduced distractions
- Recruit/retain as many biliterate sped staff as possible/needed
- Use of Wilson Curriculum for reading - for basic literacy foundation, sight words, checking for comprehension, chunk texts.
- Assess for sped eligibility/reeligibility in both Eng & Span when appropriate to better determine impact of language acquisition and develop individualized strategies
- Providing sentence frames, graphic organizers, word bank
- Visual Supports
- SDAI Strategies



Action #	Title	Description	Total Funds	Contributing
1.01	Staffing – Certificated	<p>Maintain an effective and knowledgeable instructional leadership team to ensure high-quality implementation of state-standards and instructional strategies to address the academic as well as socio-emotional needs of students; efficient management of the school (Costs include salaries and benefits)</p> <ul style="list-style-type: none"> • School Director • Assessment and Intervention Coordinator • School Culture and Character Coordinator • Dual Language Immersion Curriculum & Instruction Coordinator • Bilingual Psychologist • Bilingual Counselor <p>Attract and retain high quality, credentialed bilingual teachers to staff OCEAA's 90:10 Dual Language Immersion program, providing standards-based instruction and tiered interventions before or after school.</p> <p>Provide credentialed teachers at all grade levels (including salaries and benefits)</p> <ul style="list-style-type: none"> • TK through Grade 5 • Grades 6-8 • Special Education • Recruit/Retain as many biliterate service providers as possible within sped team 	\$4,600,729	Yes



SPED Specific Changes

1.03	Staffing – Paraprofessionals	<p>Intervention Aides for English/Language Arts and Mathematics: Provide Intervention aides under the supervision of the Instructional Coaches</p> <ul style="list-style-type: none"> • 2 literacy intervention aides • 2 math intervention aides <p>TK-K Classroom Instructional Aides: Provide up to 6 classroom instructional aides to provide assistance principally to English learners and low-income students to ensure full access to the core curriculum.</p> <p>Special Education</p> <ul style="list-style-type: none"> • Recruit/Retain as many biliterate service providers as possible within sped team 	\$1,144,724	Yes
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2.02	Professional Development	<p>Provide all teachers with in-depth professional development to support the needs of OCEAA students and to deliver high-quality instruction</p> <ul style="list-style-type: none"> • Summer Pre-Service • New Teacher Induction BTSA • Special Education EI Dorado SELPA (Stepping Stones) • Regular weekly professional development (state standards, lesson study/design, etc.) • EL Education English Language Arts Modules. • Heggerty training (Phonemic Awareness) 	\$71,300	Yes
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SPED Specific Changes

2.05	Support for English Learners & Families	<p>Ongoing implementation of <i>CA EL Roadmap</i> and required services for English Learners as articulated in OCEAA's Dual Language EL Master Plan including:</p> <ul style="list-style-type: none"> • Designated & integrated ELD instruction • ELPAC testing – initial and summative • Monthly ELAC meetings • Supplemental parent education programming for parents of ELs • Collaboration between general education and special education staff for implementation of SDAI and other strategies to support ELs with IEPs • Use of Learning Center for independent work for ELs with IEPs • Use of research-based intervention curriculum (Wilson) for pullout specialized academic instruction for ELs with IEPs as appropriate 	0 Yes
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SPED Specific Changes

Parent Needs Assessment Survey 2024-25



Average Response of “Yes.” or “Frequently.” (2.8 to 3.0+)

(15 of 31 questions)

	ELs	Non-ELs
The school’s office and reception staff make me feel welcomed and answers my questions effectively, be it in person, over the phone, or over e-mail. (out of 3)	3.0	2.9
My child receives enough instruction in LANGUAGE ARTS. (out of 3)	2.9	2.8
My child receives enough instruction in SCIENCE. (out of 3)	2.9	2.7
My child receives enough instruction in SOCIAL STUDIES. (out of 3)	2.8	2.8
My child receives enough instruction in SOCIAL-EMOTIONAL LEARNING (emotions, friendship, conflict-resolution, etc.). (out of 3)	2.9	2.7
How much information do you feel that Student-Led Conferences (SLC) provide to you about your child’s academic and social-emotional progress? (out of 4)	3.0	2.5



Average Response of “Yes.” or “Frequently.” (2.8 to 3.0+)

(15 of 31 questions)

	ELs	Non-ELs
How clear and transparent is the school’s system of evaluating your child’s academic work? (out of 4)	2.9	2.6
I understand how to use PowerSchool; I’m able to use it to stay informed about my child’s grades and academic progress. (out of 4)	3.2	3.3
The school’s informational resources and sites are easy to access and navigate (e.g., PowerSchool, OCEAA website, ParentSquare, etc.). (out of 4)	3.5	3.3
It is easy to log into and navigate ParentSquare. (out of 3)	2.8	2.8
There is a culture of inclusion in the school committees and events for parents. I feel valued and included when I attend meetings and events for parents (FSO, Coffee Chat, ELAC, Jog-a-thon, potlucks, fundraisers, etc.). (out of 3)	2.9	2.6



Average Response of “Yes.” or “Frequently.” (2.8 to 3.0+)

(15 of 31 questions)

	ELs	Non-ELs
In the past year, how often have you visited your child’s school for special events (presentations, performances, assemblies, Student-Led Conferences (SLCs))? (out of 4)	3.1	3.1
On a scale from 1-5, this school year, how often have you worried about violence at our school?	3.7	3.5
On a scale from 1-5, if your child feels bullied at school, how easy is it to access adult support?	3.7	3.8
On a scale from 1-5, how safe does your child feel at school?	4.3	4.3



Average Response of “No.” or “Very infrequently.” (0-2.1) (2-3 of 31 questions)

	ELs	Non-ELs
How often does your child’s teacher communicate with you about your child’s academic and social-emotional progress? (out of 3)	2.1	2.1
The MIDDLE SCHOOL (6th-8th) teachers and administrators work collaboratively with families and offer a variety of opportunities for parents to participate in the school community. (out of 3)	2.5	2.0
How involved have you been with (a) parent group(s) at our school? (out of 4)	1.9	1.9



Comparing Responses of Families of English Learners and Non-English Learners

In general, very similar responses (within 0.2). Those that differed by 0.3 or more:

	ELs	Non-ELs
How much information do you feel that Student-Led Conferences (SLC) provide to you about your child's academic and social-emotional progress? (out of 4)	3.0	2.5
How clear and transparent is the school's system of evaluating your child's academic work? (out of 4)	2.9	2.6
The MIDDLE SCHOOL (6th-8th) teachers and administrators work collaboratively with families and offer a variety of opportunities for parents to participate in the school community. (out of 3)	2.5	2.0
There is a culture of inclusion in the school committees and events for parents. I feel valued and included when I attend meetings and events for parents (FSO, Coffee Chat, ELAC, Jog-a-thon, potlucks, fundraisers, etc.). (out of 3)	2.9	2.6



Summary of the Comments

Commonalities amongst the comments from families of English Learners:

- Some are grateful for respectful and open communication from staff (especially in younger grades); some comments about the need for more communication (especially in older grades)
- Learning related to real life situations is appreciated
- Parents see a lot of growth in their students in both languages
- Some comments that celebrate and appreciate the social-emotional and counseling support and some that ask for more



Summary of the Comments

Commonalities amongst the comments from families of English Learners:

- Celebrating the confidence and reflectiveness offered by Student-Led Conferences
- More extracurricular classes are requested in the afternoons for the younger grades (TK-2nd)
- Appreciation for the programs available at OCEAA and the work of the teachers and staff



Q&A



School Director's Board Presentation

5.8.24



Attendance Highlights

Orange County Educational Arts Academy

04/01/2024 to 04/30/2024 = 17 school days

Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Att'd	ADA	ADA %
-1	41	0	0	0	41	697	0	0	34.00	658.00	38.71	94.40%
0	75	0	0	0	75	1275	0	0	63.00	1211.00	71.24	94.98%
Subtotal	116	0	0	0	116	1972	0	0	97.00	1869.00	109.95	94.78%
1	84	0	0	0	84	1428	0	0	78.00	1333.00	78.41	93.35%
2	73	0	0	1	72	1241	0	7	74.00	1159.00	68.18	93.92%
3	75	0	0	0	75	1275	0	0	87.00	1188.00	69.88	93.18%
Subtotal	232	0	0	1	231	3944	0	7	239.00	3680.00	216.47	93.47%
4	67	0	0	2	65	1139	0	9	81.00	1048.00	61.65	92.74%
5	64	0	0	0	64	1088	0	0	35.00	1053.00	61.94	96.78%
6	71	0	0	0	71	1207	0	0	59.00	1147.00	67.47	95.03%
Subtotal	202	0	0	2	200	3434	0	9	175.00	3248.00	191.06	94.83%
7	44	0	0	0	44	748	0	0	53.00	694.00	40.82	92.78%
8	33	0	0	0	33	561	0	0	30.00	526.00	30.94	93.76%
Subtotal	77	0	0	0	77	1309	0	0	83.00	1220.00	71.76	93.20%
Grand Total	627	0	0	3	624	10659	0	16	594.00	10017.00	589.24	94.12%



General Updates

- CAASPP plan. Messaging in and outside of school.
- Hiring and candidates. Revision of credentials. Two offers accepted.
- Summer plans, volunteers. Organization of volunteers and tasks needed.
- Frida day. Communication coming shortly. Groups selected. Connections to other events (Jog-a-Thon and 3rd grade Field Trip)
- ILT meetings, new ToA goals based on Data.
- Staff Appreciation (pins, contact with FSO, theme is Fiesta).
- Visit from Melrose Leadership Academy and EL Education. Closer to credentialing.
- LCAP plan (Mike starts first draft)



Gifted and Talented Draft

- GIFTED AND TALENTED IDENTIFICATION AND ASSESSMENT
PROTOCOL AND FORMS



EL Coordinator Updates

- ❖ Summative ELPAC Testing is nearly complete:
 - Still working on 6th-7th Speaking Tests and small number of TK-K tests
- ❖ Reclassification:
 - We have 6 additional reclassifications in process
- ❖ Pathways to Biliteracy review has been mostly completed
 - Thus far, the following students qualify:
 - 8th Grade Biliteracy Recognition: 61%
 - 6th Grade Pathway to Biliteracy Recognition: 59%
 - 3rd Grade Pathway to Biliteracy Recognition: 45%



Mastery of Knowledge and Skills Update



High-Quality Work Updates

- ❖ Case Studies currently in progress in:
 - TK, 7th, and 8th Grades
 - All other grades have completed at least one Case Study this year
 - 1st, 3rd and 4th completed 2 Case Studies each



Crew Report Highlights



- Better World Day representation. OCEAA selected. [Video](#)



Nominated for ATDLE School of Distinction

- Application description
- Submitted documentation
- Next step if we are selected to continue the selection process: site visit on May 14th or 17th
 - An introduction to OCEAA
 - Crew
 - Info Session information
 - How OCEAA's DLI program aligns to the Guiding Principles for Dual Language Education
 - A review of our student success data (both concrete, quantitative data and anecdotal data)
 - Classroom visits
 - Meetings with the Admin; teachers; students; families



School Director Board Update

May 8, 2024

Presented by

Pedro Llorente

Board Presentation 05.08.24

Priorities of support by subcommittees as identified by ALT

Presentation of main topics:

LCAP Goal 1: *OCEAA ensures student access to qualified teachers, Special Education, a broad course of study, facilities in good standing, standards-aligned instructional materials, technology and physical wellness that supports their success.*

❖ Academic Leadership Team Update:

- Gifted and Talented Identification and Assessment Protocol and Forms (draft)
- GIFTED AND TALENTED IDENTIFICATION AND ASSESSMENT FORMS
- CAASPP plan. Messaging in and outside of school.
- Hiring and candidates. Revision of credentials. Offers accepted.
- Summer plans, volunteers. Organization of volunteers and tasks needed.
- Frida day. Communication coming shortly. Groups selected. Connections to other events (Jog-a-Thon and 3rd grade Field Trip)
- ILT meetings, new ToA goals based on Data.
- Staff Appreciation (pins, contact with FSO, theme is Fiesta).
- Visit from Melrose Leadership Academy and EL Education. Closer to credentialing.
- Better World Day representation. OCEAA selected.
- LCAP plan (Mike starts first draft)

LCAP Goal 2: *OCEAA teachers effectively use data, student-engaged assessment, and language acquisition strategies to ensure students achieve academic excellence in Spanish and English.*

❖ Assessment & Intervention Coordinator Report

➤ Interventions

- **EL Enrichment Program:** Offered to EL students who Nearly Met in either Math or ELA 2023 CAASPP. Students work with either Ms. Martinez or Mrs. Chavez analyzing questions from CAASPP, understanding vocabulary used, and analyzing solutions and how to respond.
 - Afternoon sessions started January 16th, morning sessions started January 25th
 - 48 students qualified, only 45 accepted the invitation
 - ◆ Decline was due to pick up time or drop off time
 - ◆ 1 - No response
 - There is a math group and an English Language Arts group for each grade 3rd - 8th.

- Attendance for before school groups 60%
 - ◆ 1 student has never shown up
- Attendance for after school groups 68%
 - ◆ 3 students have never attended
 - ◆ Coco rehearsals affected attendance Jan 22 - 26

➤ **Assessments**

- DRA Grades Kinder - 2nd
 - At /Above T1 Benchmark - 34%
 - Approaching T1 Benchmark - 21%
 - Below T1 Benchmark - 45%
- Star Spanish 3rd - 8th Growth from BOY to T1
 - 1 - 1.4 grade level growth = 41 out of 352 students
 - 1.5 - 1.9 grade level growth = 33 out of 352 students
 - 2.0+ grade level growth = 8 out of 352 students
 - 22% of the 352 tested are above grade level Instructional Reading Level
- Star English 3rd - 8th Growth from BOY to T1 (*growth data for 4th-8th only*)
 - 1 - 1.4 grade level growth = 31 out of 280 students
 - 1.5 - 1.9 grade level growth = 10 out of 280 students
 - 2.0+ grade level growth = 12 out of 280 students
 - 32% of the 356 tested are above grade level Instructional Reading Level

❖ **EL Coordinator Report:**

- ❖ Summative ELPAC Testing is nearly complete:
 - All group tests are complete
 - 3rd-8th Grade Listening, Reading and Writing
 - Individual tests:
 - Speaking tests are complete in 1st-5th and 8th grades and are nearly complete in 6th-7th, TK-K

- ❖ Reclassification:
 - We have 6 additional reclassifications in process:
 - 6th grade: 1
 - 5th grade: 1
 - 4th grade: 1
 - 2nd grade: 1
 - 1st grade: 2

- ❖ Pathways to Biliteracy review has been mostly completed
 - Thus far the following students qualify:
 - 8th Grade Biliteracy Recognition: 20 of 33 (61%)
 - 6th Grade Pathway to Biliteracy Recognition: 42 of 71 (59%)
 - 3rd Grade Pathway to Biliteracy Recognition: 34 of 75 (45%)

LCAP Goal 3: *All OCEAA students create complex, authentic work that demonstrates a high level of craftsmanship.*

❖ **Dual Language Immersion Curriculum & Instruction Coordinator Update:**

➤ Case Studies currently in progress:

- TK: How can my family and I be responsible consumers? Where does our food come from? (*¿Cómo podemos mi familia y yo ser consumidores responsables? ¿De dónde vienen nuestros alimentos?*)
- 7th Grade: How can we proactively stop/prevent any future pandemics by limiting the spread of airborne illness?
- 8th Grade: ¿Por qué emigra la gente? (*Why do people immigrate?*)

LCAP Goal 4: *All OCEAA students develop strong character and crew spirit to become effective learners, ethical people and culturally competent leaders who contribute to a better world.*

❖ **School Culture and Character Coordinator update:**

➤ Crew Lab:

- New Crew Lab sessions will begin after student led conferences
- Teacher PD focus in response to Panorama survey data:
 - 2/21/24 Teacher Growth Mindset: Panorama Survey Data Analysis
 - ◆ Identify grade-level area of need, identify Crew (homeroom) area of need; identify students who need additional support
 - ◆ Survey on what is a “difficult” student and challenges teachers face with supporting students
 - 3/1/24 Teacher Growth Mindset: How our triggers affect our relationship with students and how we respond to their needs
 - ◆ Input session on co-regulation followed by differentiated sessions on how to support specific students (based on 2/21/24 feedback from teachers)
 - 3/6/24 Teacher Growth Mindset: Glimmers, the other side of triggers and what triggers does leadership and the Crew need to know about to respond to their needs

➤ Character Communications

- See latest data [here](#)

➤ Better World Day will focus on area of need identified in Panorama survey: regulating emotions

- Students will create emotional support stuffies to give to students/classes accompanied by a book on strategies to regulate emotions (possible poster as well)

LCAP Goal 5: OCEAA staff engage families in the life of the school, developing strong partnerships that support the well being of students and prepare them for entering a college preparatory high school program.

❖ **School Culture and Character Coordinator update:**

- Crew Newsletters - always include readings for family conversations, upcoming events around Santa Ana, SEL work for families
 - November & December/January Newsletter sent
 - March Newsletter will be sent out soon

❖ **EL Coordinator Report:**

- [May 14th, 2024 general ELAC meeting](#) covered:
 - Crew reading of *Magia: En una tierra muy lejana* by Mirelle Ortega, with a discussion led by Monica Bennett Gee
 - All attendees (live and over Zoom) received a copy of the book to take home to encourage attendance and participation
 - Draft of the revised Local Control and Accountability Plan (LCAP), presented by Mike Limón
- The next general ELAC meeting will be in the 2024-2025 school year



Orange County Educational Arts Academy (OCEAA)

A SPANISH DUAL-IMMERSION, ARTS-FOCUSED, INDEPENDENT, TK-8TH GRADE CHARTER SCHOOL

GIFTED AND TALENTED IDENTIFICATION AND ASSESSMENT PROTOCOL AND FORMS

Brief Introduction

California does not provide increased funding for gifted and talented students. Since the passage of the 2013–14 Budget Act, Gifted and Talented Education (GATE) is no longer considered a categorical program in California (<https://www.cde.ca.gov/sp/gt/>). Local Educational Agencies determine how to allocate local funds to support gifted and talented students.

Current meta-analysis of intelligence (an aggregated review of research) shows there is a genetic component for intelligence that accounts for about half of intelligence and environmental factors that accounts for the rest. Historically, testing for giftedness has been biased towards specific privileged groups. Furthermore, the complexity of the different talents can make it difficult to make a fully accurate determination.

OCEAA will offer identification and assessment for students through our current structures of assessment and support of students. Once a student is identified through this process, we will monitor services using those same school structures. A cognitive assessment (Cognitive Abilities Test, CogAt) will be added as part of the identification process when necessary.

Identification

Parents, teachers, and other staff members can nominate students for identification. Triangulation of data will be used to identify students, and will include assessments specific to gifted and talented students when necessary. The goal is to form a picture of the student through multiple sources, *and not to merely establish cut scores or thresholds for the different*

data sources. The determination will be a result of the whole picture generated by the different quantitative and qualitative data. Data collection will include:

- Current performance substantially above grade level. Substantially above refers to scores more than two grades ahead of the age-norm in Reading, Writing, and Math. This can be in Spanish, English or both.
- Teacher feedback (Form 1)
- Parent feedback (Form 2)
- Other referrals and observations from staff if necessary (Form 3).

A request for identification starts with an observed discrepancy between age-expected performance and the specific performance of the student. STAR, DRA, and other measures can reflect this discrepancy. Occasionally, a student can show gifted and talented traits that are not well reflected in the data. A parent or teacher request will not immediately lead to triangulation of data. A preliminary decision on whether or not such collection is necessary will be made using our current structures.

The *process of identification* will follow current structures for student support:

- Teachers, parents, and/or other members of the staff can *request* identification for a student using a referral form for CoST or connecting to our Intervention and Assessment Coordinator, Doraima Gómez, dgomez@oceaa.org.
- After being added for discussion, the CoST Team (Coordination of Services Team) will use initial student data to determine if identification is appropriate.
- If CoST determines that a full process of identification is necessary, all data sources will be collected:
 - Forms from teachers, parents, and staff members (forms 1, 2, and 3).
 - Reading, Writing, and Math data.
 - A cognitive assessment (CogAt).
 - All information collected will be included in the student data file (form 4)

Assessment

If the process for identification is recommended by our CoST Crew, a proctor will assess the student using CogAt. <https://www.ctd.northwestern.edu/events>. The results of that test will be compiled with previous data to determine final identification of gifted and talented students (form 4). This test is appropriate for students 2 to 8 grades. The test is provided in English and contains verbal, non-verbal, and mathematical reasoning sections. The three sections

take 2 to 3 hours to complete and are usually administered at the same time. *The non-verbal and mathematical components can be weighted differently depending on the students' language profile.*

Determination

Our CoST team will review the data to determine eligibility following the triangulation of data. There needs to be evidence of current or potential performance substantially above grade level (more than 2 years ahead) to be eligible for services. The final determination will be communicated to families by the Intervention and Assessment Coordinator and will be added to Form 4.

Appeals

Parents have the right to appeal the decision by the CoST team once (Form 5). The CoST team will review the data and collect new information if necessary. The determination of this appeal is final and will be communicated to families by the Intervention and Assessment Coordinator.

Services

Once CoST determines eligibility, an SST (Student Study Team) will start to consider the type and frequency of support and services (SST form). The SST comprises, at minimum, a family member, a Teacher, the Intervention and Assessment Coordinator, and another Administrator.

Some potential services include:

- Enrichment activities during regular school hours.
- After school activities if available.
- Subject acceleration.
- Whole grade acceleration.

The first SST meeting will help determine all conditions for the potential services and for acceleration. Acceleration serves as an opportunity to provide instruction to students that is closer to their instructional levels. Evidence backs acceleration as an appropriate service for gifted and talented students. When offering acceleration, it is important to consider all

cognitive and socio-emotional aspects. The SST meetings will determine if acceleration is a good option, and will continue to monitor the student progress on regular cycles.

Forms

Form 1: Teacher Recommendation Form: [Teacher Recommendation Form 1](#)

Form 2: Family Recommendation Form:

[Gifted and Talented Parent Recommendation Form 2](#)

Form 3: Staff Recommendation Form:

[Staff Gifted and Talented Parent Recommendation Form 3](#)

Form 4: Data File Form: [Data File GT Form 4](#)

Form 5: Appeals Form: [GT Appeal Form 5](#)



Orange County Educational Arts Academy

Health & Wellness Policy - 2023-24

Orange County Educational Arts Academy Board Members

Carmen Aparicio

Ben Stanphill

Dr. Alfonso Bustamante

Jessica Reyes

Kenia Cueto, Ph.D.

Orange County Educational Arts Academy Directors

Mike Limon, Executive Director

Pedro Llorente , School Director



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STUDENT WELLNESS

Students

The Orange County Educational Arts Academy (OCEAA), along with parents/guardians, the community, and the governing board, recognizes the link between student health and learning, and desires to provide a comprehensive program promoting healthy eating and physical activity for students. The goal of the OCEAA Wellness Policy is to help students, staff, volunteers, and families achieve and maintain a sense of well-being and overall ‘Wellness’ as they strive to reach their personal and academic goals.

OCEAA’s School Director shall build a coordinated school health system that supports and reinforces health literacy through the Wellness Committee, health education, physical education, child nutrition services, psychological and counseling services, health promotion for staff, a safe and healthy school environment, and parent/guardian and community involvement.

OCEAA’s nutrition education and physical education programs shall be based on research, consistent with expectations established in the state’s curriculum frameworks and standards, and designed to build the skills and knowledge that all students need to maintain a healthy lifestyle.

OCEAA’s Wellness Committee, directors, and site administrators will ensure that the local school Wellness Policy is implemented, monitored, and revised through the use of implementation surveys and through reports to the Governing Board every two years.

Wellness Committee

The committee will convene at least three times annually during the school year at hours convenient for public participation. Information regarding meeting times and updates will be available to the public.

The designated Wellness Committee Lead will pursue active participation within the committee by inviting teachers, parents, students, OCEAA administrators, the governing board, community-based organizations, health professionals and the general public to attend regular meetings via OCEAA’s website, and Parent Square.

NUTRITION EDUCATION, PHYSICAL ACTIVITY, FOODS & BEVERAGES, AND OTHER SCHOOL ACTIVITIES

The governing board shall adopt goals for nutrition, nutrition education and promotion, physical education and physical activity, and other school-based activities that are designed to promote student wellness in a manner that OCEAA determines appropriate.



Nutrition Education and Promotion

(New Section 204 of the Healthy-Hunger Free Kids Act of 2010)

Pursuant to the requirements of the Education Code (CA Ed/Code 51210.4), nutrition education is encouraged as part of the instructional program in grades TK-8 as suitable, integrated into core academic subjects and offered throughout the school day.

Nutrition education programs should foster and promote literacy to encourage students to obtain, interpret, and understand basic health information and services and to achieve the competence to use such information and services in ways that are health enhancing.

OCEAA aims to teach, encourage, and support healthy eating for students, school staff, parents, and the community at large. Schools will provide nutrition education and engage in nutrition promotion that may include, but is not limited to, the following:

- Offering each grade level a sequential, comprehensive, standards-based program designed to provide students with knowledge and skills necessary to promote and protect their health
- Integrating, as appropriate, into other classroom subject area instruction such as Language Arts, Math, Physical Education, Science, and Social Sciences
- Providing developmentally-appropriate, culturally-relevant, participatory activities such as taste testing, working in school gardens, field trip to farms, community gardens, and/or other community locations promoting healthy lifestyles
- Participating in the Fresh Fruit and Vegetable Program and Harvest of the Month to the maximum extent possible to introduce different fruits and vegetables to students
- Promoting the consumption of water, fruits, vegetables, whole-grain products, and low fat and fat-free dairy products, and sharing healthy food preparation methods
- Linking education and promotional activities with OCEAA's Nutritional Services, the Garden Grill, and nutrition-related organizations and community services/organizations
- Incorporating lessons to help students acquire skills such as reading food labels and meal planning
- Promoting individual school site health and wellness fairs where nutrition and physical activity information and resources will be shared with the community
- Providing consistent messaging about healthy habits where we live, learn, work, and play

School-based marketing will be consistent with nutrition education and health promotion items identified above. As such, schools will limit food and beverage marketing to promotion of those consistent with California Nutrition Standards and guidelines set forth by OCEAA.

The advertising of foods and beverages that are not available for sale in OCEAA will not be advertised on school property. Every effort will be made to select materials free of brand names/logos and illustrations of unhealthy foods.



The healthiest choices such as salads and fruits will be prominently displayed at the Garden Grill to encourage students to make healthy choices.

Physical Activity

OCEAA will provide all students with opportunities for both structured and unstructured physical activity sessions. OCEAA utilizes an Active Play approach to daily recess and weekly physical education periods. Students will spend at least 50 percent of weekly physical education periods participating in moderate to vigorous physical activity.

OCEAA's fitness activities shall promote positive self-image and teach students how to cooperate to reach common goals. OCEAA will administer the Physical Fitness Test to all students in grades five and seven as required by *EC Section 60800 and 5 CCR Section 1040*.

Students with disabilities and/or special healthcare needs will receive modified or adapted physical activity services. Exemptions include students who are ill, injured, a modified program cannot be provided, or the student is enrolled for one-half of the school day or less.

OCEAA shall:

- Incorporate nutrition and physical activity into family events provided throughout the school year
- Encourage students to incorporate small bouts of activity into their daily schedules; for example, they are encouraged to walk to school, take the stairs, etc.
- Encourage physical activity opportunities to be provided to all OCEAA students, staff, families, and community
- Ensure that opportunities for physical activity and recess will not be used as a means for punishment (Example: running laps or jogging around a playground)
- Encourage teachers to find alternatives to withholding recess or other physical activities as a punishment. The administration believes that recess and other opportunities for physical activity are an essential part of the school day
- Establish physical activity rules and safety procedures for students and staff and assign appropriate enforcement of these rules and procedures

Garden Grill Team Qualifications

Qualified nutrition professionals will administer OCEAA's meal programs. As part of the school's responsibility to operate child nutrition programs, we will provide continuing professional development for all members of the Garden Grill team. Staff development should include appropriate certification and/or training programs for OCEAA's Nutrition Services Manager and Garden Grill team, according to their levels of responsibility.



Foods and Beverages

Nutrition standards for all foods and beverages including those served in federally reimbursable meal programs, a la carte items sold by Garden Grill, food sold by student organizations, food sold by fundraisers, and food offered to students will adhere to all laws and regulations of the federal, state, local governments and the OCEAA Wellness Policy. This includes any and all existing future regulations on food service and safety. These regulations will be in effect for services offered to students during the school day. A school day is defined as the midnight before to 30 minutes after the end of the school day.

The Garden Grill will provide and disseminate health information to parents/guardians, school staff, and students about the nutrition content of meals through school menus, newsletters, handouts, meetings, the OCEAA's website, and Parent Square.

Nutrition Guidelines for Reimbursable Meals

Foods and beverages provided through federally reimbursable school meal programs shall meet or exceed federal regulations and guidance issues pursuant to 42 USC 1751-1769, 1758b, and 1771-1791 and shall meet nutrition standards as well as the nutrient and calorie levels for students of each age or grade group required by 7 CFR 210.10 and 220.8 (42 USC 1758b, 1773).

Foods should:

- Be nutritious and appealing to students by appealing to their taste preferences
- Meet the nutritional guidelines and meal pattern requirements mandated by the United States Department of Agriculture as required by the Healthy, Hunger-Free Kids Act of 2010 (HHFKA)

Meal Times and Scheduling

Schools shall:

- Participate in the National School Lunch Program, School Breakfast Program, Afterschool Snack Program, and the Seamless Summer Option to the maximum extent possible
- Ensure adequate time to eat by including at least 20 minutes of "seat time" for lunch and/or at least 10 minutes of "seat time" for breakfast
- Promote heavily our Salad Bars
- Make available free, potable water for consumption in the place where meals are served during meal service at OCEAA (Section 203, Healthy, Hunger-Free Kids Act, 2010 and AB 1413)



Sharing of Foods and Beverages

OCEAA prohibits students from sharing beverages with one another during meal or snack times, given concerns about allergies and other restrictions on some children's diets.

Unhealthy Foods

Data demonstrates that students need good nutrition for healthy brain development. All of OCEAA is committed to providing a school environment that promotes and protects the student's health, well-being and the ability to learn by supporting healthy eating and physical activity. All menus and food offerings are intentionally designed to be as healthy as possible. We ask for collaboration with families to keep our environment healthy by doing your best to send your child with nutritious offerings.

OCEAA discourages junk food in the school building, including but not limited to candy, cake, cupcakes, cookies, donuts, chips, donuts, soda, fast food, sugary drinks (frappuccinos, sport drinks, ice-tea, flavored water, etc.). When students bring unhealthy food products to OCEAA, the Nutrition Services Manager will offer the student the opportunity to trade the unhealthy item for a healthier choice. Introducing new foods and options in a positive dialogue with students is an OCEAA priority.

Communication with Parents

OCEAA supports parents' efforts to provide a healthy diet and daily physical activity for their children. OCEAA encourages parents to pack healthy lunches and snacks and to refrain from including beverages and foods that do not meet USDA's nutrition standards. OCEAA will provide parents a list of suggested foods that meet the Smart Snacks in Schools standards and ideas for healthy celebrations/parties, rewards, and fundraising activities. In addition, OCEAA will provide opportunities for parents/guardians to learn more about nutrition, healthier food practices and sample recipes.

Free and Reduced-Price Meals

OCEAA recognizes that adequate nutrition is essential to child development and learning, and that some families may not be able to provide a nutritious breakfast and lunch for their children. In accordance with the law, OCEAA shall provide nutritionally adequate free and reduced price meals for students whose families meet federal eligibility criteria by participating in available federal nutrition programs to the extent possible.

OCEAA will take steps required by federal law/regulation to protect the privacy of students who qualify for free or reduced priced meals. Codes are assigned to meal status on student lists to prevent overt identification.

OCEAA will specify how families are provided information about determining eligibility for free/reduced priced meals. Paper applications for free/reduced priced meals will be available to all families prior to the start of the new school year. Online applications will be available on OCEAA's school website prior to the start of the new school year as well.

School Beverages

OCEAA limits all beverages to water, 100% juice, and milk; this includes all beverage sales and drinks brought by students. All beverages must be caffeine-free. Portion sizes of juice and milk vary by the grade of students. In order to be compliant with USDA guidelines and to support healthy food choices and improve student health and well-being, allowable beverages that can be brought by students and/or sold include:

- Water
 - No added sweeteners, flavors, etc.
 - No serving size limit
- 100% fruit or vegetable juice
 - No added sweeteners, and
 - Less than or equal to 8 fluid ounce serving size for elementary school students
 - Less than or equal to 12 fluid ounces serving size for middle school students
- Milk
 - 1% or fat-free unflavored milk
 - Less than or equal to 8 fluid ounce serving size for elementary school students
 - Less than or equal to 12 fluid ounce serving size for middle school students
- Non-dairy milk:
 - Nutritionally equivalent to milk, must contain per 8 fluid ounces:
 - At least 276 milligrams calcium
 - At least 8 grams protein
 - At least 500 IU Vitamin A
 - At least 100 IU Vitamin D
 - At least 24 milligrams magnesium
 - At least 222 milligrams phosphorus
 - At least 349 milligrams potassium
 - At least 0.44 milligrams riboflavin
 - At least 1.1 micrograms Vitamin B12, and
 - Less than or equal to 8 fluid ounce serving size for elementary school students
 - Less than or equal to 12 fluid ounce serving size for middle school students

Allergy Policy

There are students within our OCEAA community with documented severe food allergies. If student food allergies become extreme or unmanageable, OCEAA reserves the right to move toward a 100% nut free school model with appropriate communication. The school nurse must be informed of all school allergies.



Please do not send in any food items to be consumed in the classroom that contains peanuts, nuts, peanut butter, nut butters, or peanut products.

- This includes almonds, filberts, Brazil nuts, cashews, hazelnuts, macadamia nuts, pecans, pine nuts, pistachios, and walnuts.
- Read labels carefully to make sure the products are nut free. This includes labels that read “May contain traces of peanuts/nuts” or “processed in a facility that processes products that contain peanuts/nuts.”
- Food labels and ingredients change over time, so always read the label each time before purchasing snacks.
- **NO HOMEMADE TREATS MAY BE BROUGHT INTO THE CLASSROOM** for parties. All treats/snacks brought to the classroom must be packaged and have an ingredient label. Yanelly Alonso, our Nutritional Services Supervisor, will be happy to help you plan a safe treat/snack in advance of a scheduled class party.
- If your child has eaten peanuts, peanut butter, or nuts (such as cashews) prior to coming to school, please be sure your child’s hands have been thoroughly washed prior to entering the school.

OCEAA’s Nutritional Services is not required to make accommodations based on food preferences of a family or child.

OCEAA must make substitutions to meals for children with a disability that restricts the child's diet on a case-by-case basis and only when supported by a written medical statement from a state licensed healthcare professional. The California Department of Education only permits the following state licensed healthcare professionals to complete and sign a written medical statement for a disability: licensed physicians, physician assistants, or nurse practitioners.

Competitive Foods and Beverages

OCEAA is committed to ensuring that all foods and beverages available to students during the school day support healthy eating. The foods and beverages sold and served outside of the school meal program (e.g., “competitive” foods and beverages) will meet the USDA Smart Snacks in School nutrition standards. Smart Snacks in School aim to improve student health and well-being, increase consumption of healthy foods during the school day and create an environment that reinforces the development of healthy eating habits. A summary of the standards and information, as well as a Guide to Smart Snacks in Schools are available at: <https://www.fns.usda.gov/tn/guide-smart-snacks-school>.

In order to be compliant with the USDA final rule and to support healthy food choices and improve student health and well-being, all foods and beverages outside the reimbursable school meal programs that are sold to students during the school day must meet or exceed the USDA Smart Snacks nutrition standards. These standards will apply to all services where foods and beverages are sold, which may include, but not limited to, a la carte food sold by Garden Grill, food sold by student organizations, food sold by fundraisers, and food offered to students.



To qualify as a Smart Snack, a snack or entree must:

- be a grain product that contains 50% or more whole grains by weight (have a whole grain as the first ingredient), or
- have as the first ingredient a fruit, vegetable, dairy product or protein food, or
- be a combination food that contains at least ¼ cup of fruit and/or vegetable, and
- meet the following minimum standards for calories, sodium, sugar and fats:

Nutrient	Snack	Entree
Calories	200 calories or less	350 calories or less
Sodium	200 mg or less	480 mg or less
Total Fat	35% of calories or less	35% of calories or less
Saturated Fat	Less than 10% of calories	Less than 10% of calories
Trans Fat	0g	0g
Sugar	35% by weight or less	35% by weight or less

Celebrations and Rewards

OCEAA limits celebrations during the school day to no more than one party per class per month on the last Friday of the month. This includes classroom celebrations and birthdays. Classroom celebrations will focus on activities rather than food. Foods are to meet USDA's [Smart Snacks in School](#) nutrition standards. The [Alliance for a Healthier Generation Smart Food Planner](#) provides a link to Smart Snack compliant products as well as a [calculator](#) to check your food labels for compliance. All foods brought to main campus for celebrations will be held in the Garden Grill for distribution after lunch. All foods brought to the Annex building will be held in "La Cocinita" for distribution after lunch. All foods will be required to be individually packaged with an ingredient list to Nutritional Services.

OCEAA does not use foods and beverages as rewards and does not withhold foods as a punishment. Using food as a reward or withholding as a punishment undermines healthy eating habits and interferes with children's ability to self-regulate their eating.

OCEAA encourages non-food alternatives as rewards. Teachers may use non-food alternatives as rewards. For example, extra recess may be provided when time allows.

Fundraising

Fundraising activities will strive to support healthy eating and wellness. Any foods or beverages sold as a fundraiser to students on school campus, during the school day, outside of the school meal program must comply with the state and federal competitive food or beverage restrictions and meet the USDA's Smart Snacks in School nutrition standards.



Field Trips

The National School Lunch Program regulations require all students be offered the option to take a complete school lunch meal with them when going on a field trip.

*Complete school lunch meal provided by the National School Lunch Program must follow the nutrition guidelines for the specific age group

OTHER SCHOOL HEALTH ACTIVITIES

Staff Wellness

OCEAA recognizes the link between employee health and well being as vital to the work and the mission of OCEAA. OCEAA's goal is to provide work environments that increase health awareness, promote positive lifestyles, decrease the risk of disease, and enhance the quality of life for OCEAA employees.

OCEAA highly values the health and well-being of every staff member and will plan and implement activities and policies that support personal efforts by staff to maintain a healthy lifestyle.

Staff are encouraged to model healthy eating and drinking behaviors.

Teachers and Staff who consume snacks or lunch alongside students should only eat healthy foods and beverages in their presence. Staff and teachers are provided with break/lunch periods and are not required to eat with students.

Student Wellness

OCEAA shall:

- Provide all students a credentialed school nurse or a designated staff member who has current certification in CPR and first aid and is supervised by, and has physical or electronic access to, the school nurse or another duly qualified health supervisor
- Provide students access to credentialed school counselors and psychologists, as needed, who offer support and assistance in making healthy decisions, managing emotions, and coping skills
- Require schools to provide a safe and healthy school environment that supports health literacy and emotional safety

KEDS: After School Program

OCEAA shall require:

- KEDS to provide physical activity opportunities for all students after school
- Snacks and meals are to meet USDA federal and state guidelines. Food that does not meet USDA nutritional requirements will not be allowed for distribution.



Implementation, Evaluation and Monitoring

Program Implementation and Evaluation References: Education Code (EC), sections 49431 (c), 49431.2 (d), and 49434

The Director's and Wellness Committee Lead shall recommend for Governing Board approval of specific quality indicators that will be used to measure the implementation of the policy school wide. These measures shall include, but not be limited to:

- An analysis of the nutrition content of meals served
- Student participation rates in school meal programs
- Frequent reminders via emails and meetings to teachers, staff, and parents/guardians
- Summary of school events that supports positive healthy lifestyles
- Surveys and follow-ups to students and staff about the meal program and school activities
- Feedback from food service personnel, school administrators, the wellness committee, parents/guardians, students, and other appropriate persons

The Wellness Committee Lead will be responsible for ensuring that the wellness policy is implemented throughout all of OCEAA by communicating regularly with school administrators, teachers, and parents/guardians. Primary operational responsibility for the wellness policy will be as follows:

1. The Nutrition Services Manager will ensure that all federal, state, and local laws and regulations regarding the child nutrition programs are strictly enforced.
2. The School Director's will ensure that nutrition guidelines for foods available at schools are followed, that competitive food sales during the school day meet or exceed state and federal regulations, and school approved physical activity programs will be provided.
3. OCEAA will designate one staff member from each department to be a wellness liaison who will be responsible for working within their department to ensure compliance within the school and for reporting progress to the Wellness Committee. The Wellness Committee will provide assistance with implementing the Wellness Policy at the school level as needed.

The Wellness Committee Lead will conduct a qualitative assessment of policy implementation every two years using the [Wellness School Assessment Tool-Implementation \(Well SAT-I\)](#).

The Wellness Committee Lead will provide an annual report to the Governing Board evaluating the implementation of the policy. This information/report will be made public and will be shared with the directors, staff, students and parents/guardian through the following means of communication: OCEAA school websites, e-mails, and social media.

The annual progress report will include a link to OCEAA's Wellness Policy, a summary of wellness activities implemented that school year, and contact information for the OCEAA Wellness Committee Lead. The report will include information on the next Wellness Committee meeting for those who want to participate.



The director shall report to the Governing Board every two years on the implementation of this policy and any other policies related to nutrition and physical activity. As necessary, the wellness policy shall be revised and/or modified to reflect state and federal laws and evaluation results.

OCEAA's Wellness Committee will review and update the policy every two years with consideration to the most current state and national recommendations as applicable to student wellness.

Nutrition education and information regarding the nutrition standards will be provided to parents/guardians in the form of handouts, OCEAA's website, e-mail, Class Dojo, Parent Square, and/or through any other appropriate means available to reach parents.

Posting Requirements

Required communications on the Wellness Policy are to be posted on the OCEAA website and available to the public at the school site. (Education Code 49432)

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotope, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at 800- 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the [USDA Program Discrimination Complaint Form](#), (AD-3027) found online at: [How to file a complaint](#), and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call 866-632-9992. Submit your completed form or letter to USDA by:

(1) mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

(2) fax: 202-690-7442; or

(3) email: program.intake@usda.gov



OCEAA is an equal opportunity provider.

Wellness Policy Committee Members

Mike Limon Executive Director

Rosalinda Vargas Human Resource Manager

Vincent Severen Nutrition Services Manager

Miriam Ramirez KEDS/ Student Activities Manager

Ivan Luna School Counselor

Dustin Alexander School Librarian

Pattie Cordova Marketing Consultant

Christina Geiger Parent



State of California
 Commission on Teacher Credentialing
 Certification Division
 1900 Capitol Avenue
 Sacramento, CA 95811-4213

Email: credentials@ctc.ca.gov
 Website: www.ctc.ca.gov

DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: 2024-2025

Revised Declaration of Need for year: _____

FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL

Name of District or Charter: Orange County Educational Arts Academy District CDS Code: 100966

Name of County: Orange County CDS Code: 30

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board/body of the school district or charter school specified above adopted a declaration at a regularly scheduled public meeting held on 6/12/24 certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

► **Enclose a copy of the board agenda item**

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, 2026.

Submitted by (Superintendent, Board Secretary, or Designee):

Mike Limón _____ Executive Director
Name *Signature* *Title*

Fax Number *Telephone Number* *Date*

Mailing Address

E-Mail Address

FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY OR NONPUBLIC SCHOOL AGENCY

Name of County _____ County CDS Code _____

Name of State Agency _____

Name of NPS/NPA _____ County of Location _____

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on ____/____/____, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, _____.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

Name	Signature	Title
Fax Number	Telephone Number	Date
Mailing Address		
EMail Address		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

Type of Emergency Permit	Estimated Number Needed
CLAD/English Learner Authorization (applicant already holds teaching credential)	2 _____
Bilingual Authorization (applicant already holds teaching credential)	4 _____
List target language(s) for bilingual authorization: <u>Spanish</u>	
Resource Specialist	_____
Teacher Librarian Services	_____
Emergency Transitional Kindergarten (ETK)	_____

LIMITED ASSIGNMENT PERMITS

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year’s actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	2
Single Subject	2
Special Education	
TOTAL	4

Authorizations for Single Subject Limited Assignment Permits

SUBJECT	ESTIMATED NUMBER NEEDED	SUBJECT	ESTIMATED NUMBER NEEDED
Agriculture		Mathematics	
Art		Music	
Business		Physical Education	
Dance		Science: Biological Sciences	
English		Science: Chemistry	
Foundational-Level Math		Science: Geoscience	
Foundational-Level Science		Science: Physics	
Health		Social Science	1
Home Economics		Theater	
Industrial & Technology Education		World Languages (specify)	Spanish 2

EFFORTS TO RECRUIT CERTIFIED PERSONNEL

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to www.cde.ca.gov for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL

Has your agency established a District Intern program? Yes No

If no, explain. Small Charter School without enough resources

Does your agency participate in a Commission-approved college or university internship program? Yes No

If yes, how many interns do you expect to have this year? _____

If yes, list each college or university with which you participate in an internship program.

If no, explain why you do not participate in an internship program.
Small Charter School without enough resources

