



# NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT

Ambler · Buckland · Deering · Kiana · Kivalina · Kobuk · Kotzebue · Noatak · Noorvik · Selawik · Shungnak  
PO Box 51 · Kotzebue, Alaska 99752 · Phone (907) 442-1800

## NWABSD BOARD OF EDUCATION

### Budget Committee Meeting

Conducted via Teleconference

Call 1-833-682-3239, enter code: 621 059 930#

### Agenda

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**November 18, 2024**

**10:30 a.m.**

- I. FY25 Financial Report as of October 31, 2024
- II. FY26 Budget Development Schedule
- III. Action Items with Budget impact:
  - Approval of MOA Increase – JLM, LLC
  - Approval of DocuSign 3-Year Agreement Purchase
  - Approval of FY-25 Contract; J & H Consulting
- IV. Future Business:
  - FY26 Preliminary Budget

**Administrative Services Business Manager: Natalie Dickey**

MISSION: To provide a learning environment that inspires and challenges students and employees to excel.  
VISION: To graduate all students with the knowledge, skills, and attitudes necessary for a successful future.



# Northwest Arctic Borough School District

## FY26 Budget Development Schedule

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<u>Date</u>	<u>Budget Process</u>
November	Directors/Departments are given their budget workbooks to use to develop their budgets for the next year
Early to Mid-December	Final Student Count is Verified by DEED from October 2024 Count.
Mid-December	Funding for FY25 school year is verified by DEED. Will inform NWAB of any changes.
January 1, 2025	Budgets due back from Directors/Departments
By February 1, 2025	Superintendent and Administration project personnel and fixed costs for FY26 and develop a preliminary budget.
February, 2025	Administration reviews, discusses, adjusts preliminary budget before Board presentation.
March, 2025	FY26 Operating Budget is presented to the School Board and adjusted at budget work session
March, 2025	Joint Session with Northwest Arctic Borough School District and Northwest Arctic Borough
April, 2025	FY26 Proposed Operating Budget is presented to the School board at the Regular School Board Meeting; as per Board Policy BP3000, the Board must adopt the annual budget by May 1 <sup>st</sup>
By May 1, 2025	Submit Adopted FY26 District Operating Budget to the Northwest Arctic Borough Mayor and Assembly
By July 15, 2025	Submit Adopted FY26 District Operating Budget to the State of Alaska Department of Education and Early Development

THIS SCHEDULE WILL CHANGE BASED ON THE APPROVED BOARD MEETING SCHEDULE AND DISTRICT NEEDS.

**Serving the Villages of**

**Ambler • Buckland • Deering • Kiana • Kivalina • Kobuk • Kotzebue • Noatak • Noorvik • Selawik • Shungnak**

**Northwest Arctic Borough School District  
Financial Narrative  
For Month Ending September 30, 2024**

**Included in the attached report are the reports for General Fund Revenue & Expenditures, Board Expenditures, and the Investment Account balance for month ending 9/30/2024. The Board last received a report September 23, 2024 with expenditures and revenue through August 31, 2024.**

**We are approximately 25% through the fiscal year and have expended 20% of our general operating budget, and received 19% of our budgeted general fund revenue. 78% of our General Fund budget is expended and encumbered. As reported in the last meeting, the months of October and November will see a significant increase in expenditures.**

**Northwest Arctic Borough School District  
General Fund Revenue  
For Month Ending September 30, 2024**

		Approved				
		<u>Budgeted</u>	<u>Year to Date Exp</u>	<u>Encumbrance</u>	<u>Variance</u>	<u>% of Budget</u>
<b>Revenues By Object:</b>						
011	Other Borough Revenue	8,068,263	-	-	8,068,263	0%
012	In-Kind Contribution	-	-	-	-	NA
030	Interest Income	770,000	210,771	-	559,229	27%
040	Other Local Revenue	2,100,000	268,777	-	1,831,223	13%
047	E-Rate Program Revenue	7,205,220	3,133,800	14,987,592	(10,916,172)	43%
051	Foundation Program	38,250,938	9,453,972	-	28,796,966	25%
090	Other State Funding	4,800,549	-	-	4,800,549	0%
056	TRS On-Behalf	2,505,160	-	-	2,505,160	0%
057	PERS On-Behalf	447,788	-	-	447,788	0%
111	Impact Aid	3,476,274	-	-	3,476,274	0%
250		-	-	-	-	NA
<b>Revenue Totals</b>		67,624,192	13,067,320	14,987,592	39,569,280	19%
			19% % Received to date			

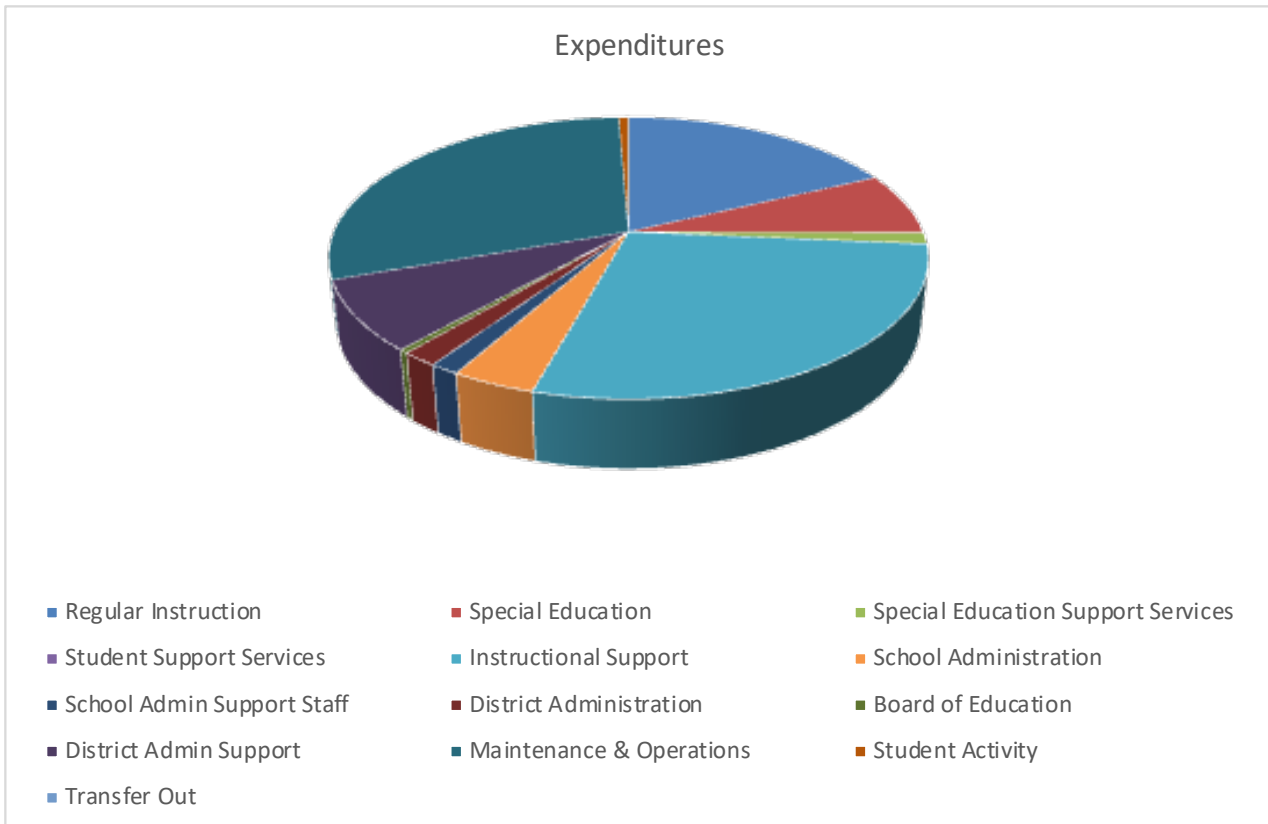
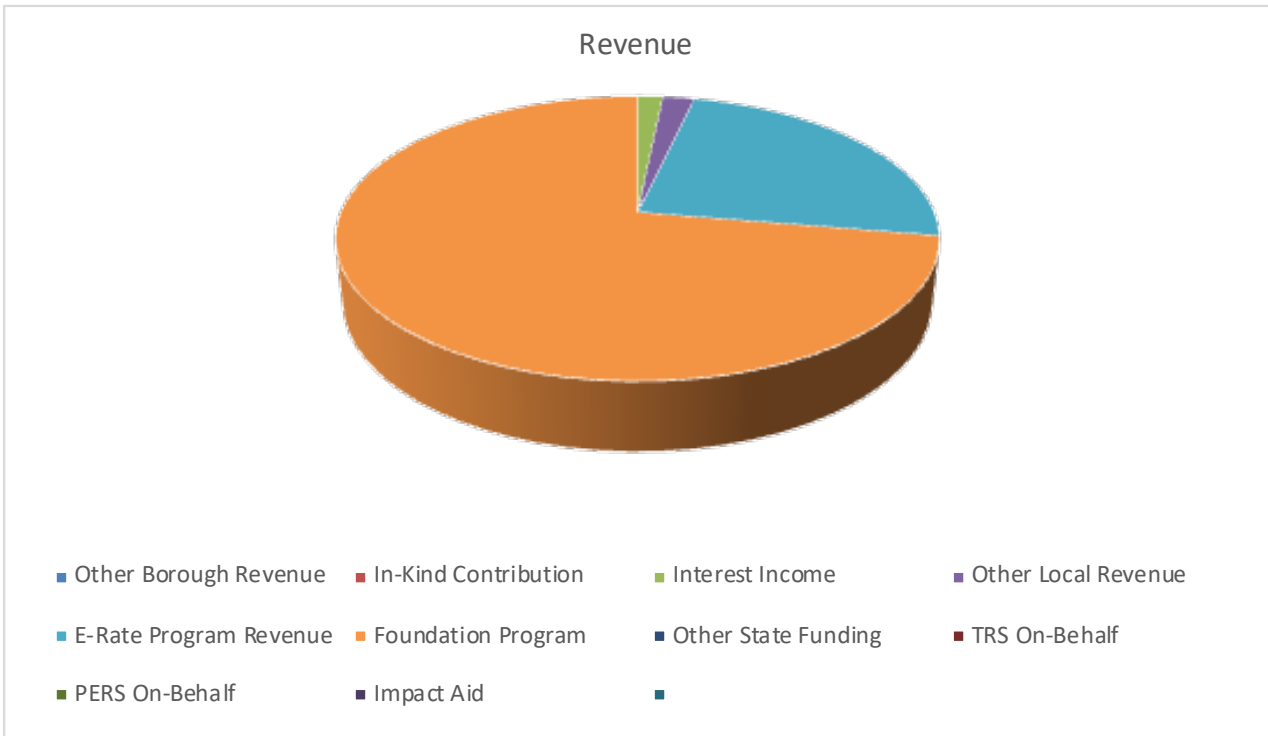
<b>Percentage of All Funds Total Budget Expended:</b>	19.84%
Percentage of Year Passed:	25.00%
General Checking Account Ending Balance	\$4,947,949.62
Wells Fargo IILD Account	\$15,440,084.56
JNES Scholarship Account	\$4,186.77
Month End Cash In Bank Account	<u><u>\$20,392,221</u></u>

**Northwest Arctic Borough School District  
General Fund Expenditures by Object & Function  
For Month Ending September 30, 2024**

		<u>Approved</u>				
		<u>Budget</u>	<u>Year to Date Exp</u>	<u>Encumbrance</u>	<u>Variance</u>	<u>% of Budget</u>
<b>Expenditures By Object:</b>						
310	Certificated Salaries	15,429,407	2,593,973	10,866,280	1,969,154	17%
320	Non-Certificated Salaries	9,335,698	1,407,362	5,441,846	2,486,490	15%
331	Leave Pay Out	285,000	2,941	-	282,059	1%
333	Stipends	99,750	49,500	-	50,250	50%
360	Employee Benefits	12,645,809	1,806,511	1,307,963	9,531,336	14%
367	TRS On-behalf	2,505,160	-	-	2,505,160	0%
368	PERS On-behalf	447,788	-	-	447,788	0%
	<b>SUBTOTAL: Personnel</b>	<b>40,748,612</b>	<b>5,860,287</b>	<b>17,616,089</b>	<b>17,272,236</b>	<b>14%</b>
410	Professional & Technical Services	4,842,647	523,838	1,502,771	2,816,038	11%
420	Staff Travel	424,000	57,063	17,615	349,322	13%
420	Board Travel	108,852	3,843	14,808	90,201	4%
425	Student Travel	1,144,775	54,400	40,738	1,049,637	5%
430	Utility Services	8,410,727	3,562,453	16,934,093	(12,085,819)	42%
435	Energy-includes electricity & fuel	4,323,719	2,119,580	1,502,395	701,744	49%
440	Other Purchased Services	4,470,556	31,286	3,359,053	1,080,217	1%
445	Property & Liability Insurance	1,350,000	1,396,451	-	(46,451)	103%
450	Supplies, Materials & Media	1,754,263	408,054	267,316	1,078,893	23%
480	Tuition	40,000	-	15,509	24,491	0%
490	Dues & Fees	87,680	24,541	41,358	21,782	28%
510	Inventoried Equipment	55,000	-	-	55,000	0%
495	Indirect Cost Recovery	(250,000)	(48,134)	-	(248,211)	19%
	<b>SUBTOTAL: Non-Personnel</b>	<b>26,762,219</b>	<b>8,133,375</b>	<b>23,695,655</b>	<b>(5,113,157)</b>	<b>30%</b>
550	Transfer Out	3,005,214	-	-	3,005,214	0%
<b>Expense Totals</b>		<b>70,516,044</b>	<b>13,993,662</b>	<b>41,311,744</b>	<b>15,164,293</b>	<b>78%</b>
		20% Expended to date				
		<u>Budgeted</u>	<u>Year to Date Exp</u>	<u>Encumbrance</u>	<u>Variance</u>	<u>% of Budget</u>
<b>Expenditures by Function</b>						
100	Regular Instruction	17,977,977	2,508,622	8,019,279	7,450,077	14%
200	Special Education	8,627,583	1,002,128	3,338,327	4,287,128	12%
220	Special Education Support Services	1,260,998	178,395	705,924	376,679	14%
300	Student Support Services	297,660	5,688	1,059	290,913	2%
350	Instructional Support	10,303,824	3,905,475	17,766,885	(11,368,536)	38%
400	School Administration	3,334,747	536,307	1,825,566	972,874	16%
450	School Admin Support Staff	1,459,652	189,430	520,018	750,205	13%
510	District Administration	1,245,159	232,795	548,120	464,245	19%
511	Board of Education	642,793	58,944	62,936	520,913	9%
550	District Admin Support	3,122,143	1,126,199	1,198,338	797,606	36%
600	Maintenance & Operations	17,424,106	4,162,474	6,991,964	6,269,669	24%
700	Student Activity	1,814,189	87,208	333,329	1,393,652	5%
900	Transfer Out	3,005,214	-	-	3,005,214	0%
<b>Total Expenditures</b>		<b>70,516,044</b>	<b>13,993,662</b>	<b>41,311,744</b>	<b>15,210,638</b>	<b>78%</b>

**Northwest Arctic Borough School District  
General Fund Revenue & Expenditures by Function  
For Month Ending September 30, 2024**

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**Northwest Arctic Borough School District  
Board Expenditures  
For Month Ending September 30, 2024**

		Approved <u>Budgeted</u>	<u>Year to Date Exp</u>	<u>Variance</u>	<u>% of Budget</u>
<b>Expenditures by Object</b>					
333	Stipends	87,750	17,500	70,250	20%
36?	Benefits	290,511	2,150	288,361	1%
410	Professional & Technical Services	111,000	19,046	91,954	17%
420	Travel	108,852	3,843	105,009	4%
450	Supplies	5,000	30	4,970	1%
490	Other Expenses (Dues & Fees)	39,680	16,375	23,305	41%
<b>Total Expenditures</b>		<b>\$ 642,793</b>	<b>\$ 58,944</b>	<b>\$ 583,849</b>	<b>9%</b>

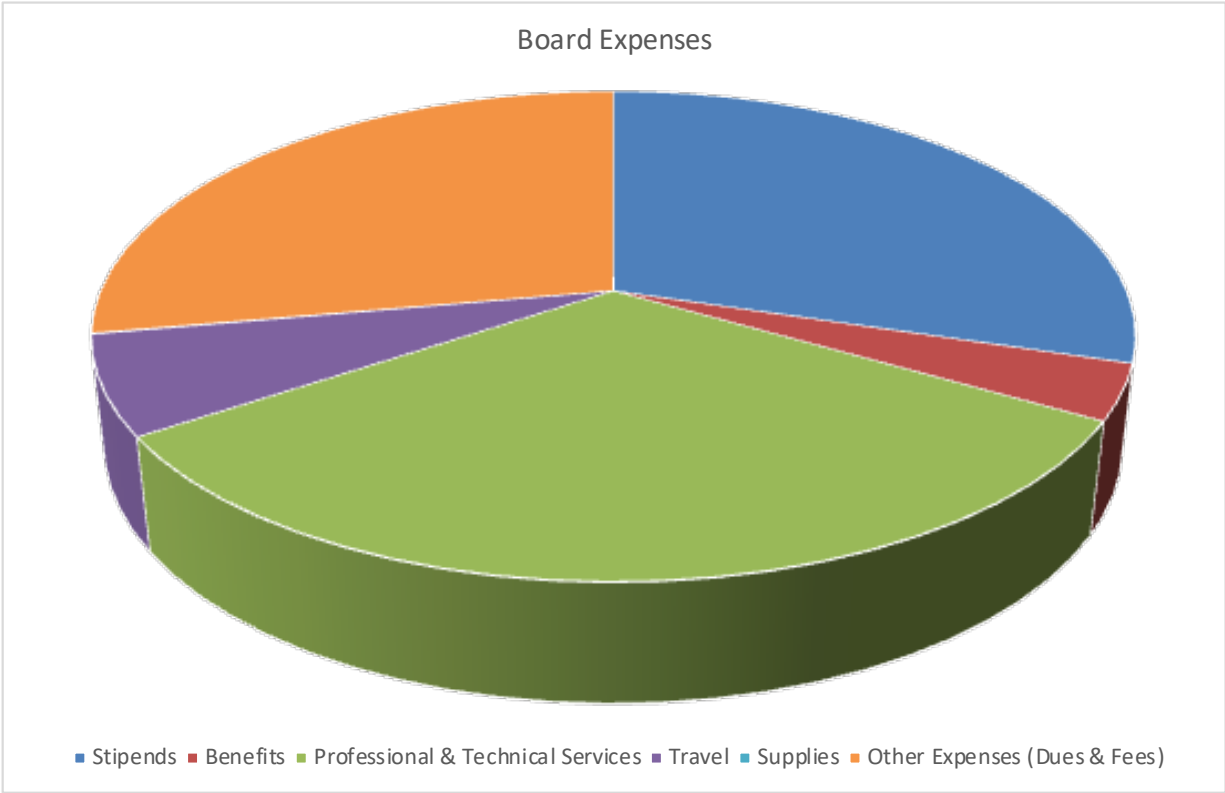
**Board Budget Summary**

**Board Stipends**

		Members	# of times	# of Days	FY25 TOTAL
\$ 250	NWALT Meeting - July 1, 2024	1	1	1	\$ 250
\$ 250	AASB Board Meeting in OTZ	1	1	3	\$ 750
\$ 250	Executive Committee Meeting	4	1	1	\$ 1,000
\$ 250	August Region Meeting	2	1	1	\$ 500
\$ 250	August 26 Board Meeting	11	1	1	\$ 2,750
\$ 250	August 27 Board Meeting	11	1	1	\$ 2,750
\$ 250	September 23 Board Meeting	11	1	1	\$ 2,750
\$ 250	September 24 Board Meeting	11	1	1	\$ 2,750
\$ 250	September QUAD Meeting	7	1	2	\$ 3,500
<b>TOTAL</b>					<b>\$ 17,500</b>
<b><u>Benefits</u></b>					
	Health Insurance				\$ -
\$ 2,150	Other Benefits				\$ 2,150
<b>TOTAL</b>					<b>\$ 2,150</b>
<b><u>Professional &amp; Technical Services</u></b>					
\$ 11,666	Lobbyists				\$ 11,666
\$ 7,380	AASB Annual Meeting Services				\$ 7,380
<b>TOTAL</b>					<b>\$ 19,046</b>
<b><u>Travel &amp; Perdiem</u></b>					
\$ 2,308	Airfare/Hotel/Car				\$ 2,308
\$ 1,535	Per-Diem				\$ 1,535
<b>TOTAL</b>					<b>\$ 3,843</b>
<b><u>Miscellaneous Exp</u></b>					
\$ 30	Supplies, media and freight for Board & Board meetings				\$ 30.00
\$ 13,700	CEE membership and AASB fees				\$ 13,700.00
\$ 2,675	National School Board Association				\$ 2,675.00
<b>TOTAL</b>					<b>\$ 16,405</b>
<b>Grand Total</b>					<b>\$ 58,944</b>

**Northwest Arctic Borough School District  
Board Expenditures  
For Month Ending September 30, 2024**

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**Northwest Arctic Borough School District  
Investment Account Earnings  
For Month Ending September 30, 2024**

	<b>Fiscal Year</b>	<b>IILD GF Earnings</b>	<b>IILD CIP Earnings</b>	<b>Total Earnings</b>	
1	FY19	\$ 112,675.74	\$ -	\$ 112,675.74	
2	FY20	\$ 134,699.78	\$ -	\$ 134,699.78	
3	FY21	\$ 1,694.94	\$ 2,564.11	\$ 4,259.05	
4	FY22	\$ 13,734.29	\$ 12,012.88	\$ 25,747.17	
5	FY23	\$ 316,919.38	\$ 17,754.50	\$ 334,673.88	
6	FY24	\$ 692,319.01	\$ -	\$ 692,319.01	
7	FY25	\$ 201,565.56	\$ -	\$ 201,565.56	<b>Year to date</b>
		<b>\$ 1,473,608.70</b>	<b>\$ 32,331.49</b>	<b>\$ 1,505,940.19</b>	

## MEMORANDUM

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**TO:** NWABSD Board of Education  
Members

**DATE:** November 18, 2024

**NUMBER:** 25-027

**FR:** Office of the Superintendent

**SUBJECT:** Approval of MOA  
Addendum – JLM, LLC

**ABSTRACT:**

Board approval is required for contracts that exceed \$50,000.

**ISSUE:**

At issue is the Board's Approval to amend the Memorandum of Agreement (MOA) with Jenny Martens of JLM, LLC for a total amount not to exceed \$75,000.00.

**BACKGROUND AND/OR PERTINENT INFORMATION:**

Jenny Martens of JLM, LLC provides professional school business services for the Northwest Arctic Borough School District business office. The original MOA was generated for the amount of \$35,000.00. The amended MOA, which entails additional business office services during the transition and training of the previous Director of Administrative Services to the current Assistant Director of Administrative Services/Administrative Services Business Manager team, will be increased by \$33,000.00 for the remainder of FY25, for a total not to exceed \$75,000.00.

**ALTERNATIVES:**

1. Approve the amendment to Memorandum of Agreement (MOA) with Jenny Martens of JLM, LLC for the amount not to exceed \$75,000.00 as presented;
2. Disapprove the amendment MOA for JLM, LLC as presented;
3. Take no final action.

**ADMINISTRATION'S RECOMMENDATION:**

The administration recommends board approval of the MOA with JLM, LLC for a total amount not to exceed \$75,000.00 as presented.

**NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT**

**ADDENDUM TO  
MEMORANDUM OF AGREEMENT**

MOA # 225-002

Between

Contractor Name: JENNY MARTENS

Address: PO BOX 2163

PETERSBURG, AK 99833

and

**Northwest Arctic Borough School District**

The above referenced Memorandum of Agreement is hereby amended as follows:  
MOA Addendum:

	<u>Amount</u>
Account #: <u>100.099.550.000.410</u>	<u>\$ 68,000.00</u>
Account #: <u>100.099.220.000.410</u>	<u>\$ 5,000.00</u>
Account #: <u>292.099.220.000.410</u>	<u>\$ 2,000.00</u>
Account #: _____	<u>\$ _____</u>
Account #: _____	<u>\$ _____</u>
<b>NEW MOA Total:</b>	<u>\$ 75,000.00</u>

Budget Authority Approval: \_\_\_\_\_

Budget Authority Approval: \_\_\_\_\_

**Contractor Agrees:** n/a  
\_\_\_\_\_  
\_\_\_\_\_

**District Agrees:** n/a  
\_\_\_\_\_  
\_\_\_\_\_

Date of Board Approval (if applicable): November 19, 2024

Agreed to by:

\_\_\_\_\_  
Contractor, (Sign and Return to Program Contact Person) \_\_\_\_\_  
Date

\_\_\_\_\_  
Superintendent- Authorized Signature, NWABSD \_\_\_\_\_  
Date

\_\_\_\_\_  
Director of Administrative Services, NWABSD \_\_\_\_\_  
Date

## **Instructions for Completing MOA Form**

1. You should have all of the information needed before completing and submitting the MOA. Please review the two-page MOA and if you have questions, contact Brad Eisel at 907-442-1822 or [beisel@nwarctic.org](mailto:beisel@nwarctic.org).
2. If you are not the budget authority (BA) for this MOA, please get the BA's approval as shown by their signature on page 1, prior to submitting for approvals.
3. In the "Contractor Agrees To" section, please be as detailed as possible in describing the services to be provided by the Contractor, such as number of training days, type of service, etc.
4. In the "District Agrees To" section, list in detail what the District is to provide the Contractor for their services, such as reimbursement of air travel, lodging, ground transportation, per diem, miscellaneous costs (i.e. copies and faxes), and cost of services, such as daily rate, flat fee, etc. Do not enter Payment terms in this section.
5. In the "Payment Terms" section, detail the instructions for the payment(s) to the Contractor (i.e. to be paid in 4 installments as work is performed and invoice is provided, or one payment at the completion of services when invoice is presented).
6. The MOA Control # is filled in on page 1 and on page 2 Section B, after MOA has all required approvals.
7. Remember to give yourself plenty of time to complete the MOA form and get the necessary approvals and signatures prior to having the services performed by the Contractor.
8. This contract may be terminated by either party with a 30-day written notice.

Northwest Arctic Borough School District

P. O. Box 51 Kotzebue, AK 99752

MEMORANDUM OF AGREEMENT (MOA)

MOA's for more than \$50,000 must be approved by the School Board prior to start of Contract
In a fiscal year MOA's to the same Contractor totaling more than \$50,000 must be approved by the School Board prior to start of Contract
Remember to follow federal procurement regulations when using federal funds to support the MOA

TAB BETWEEN FIELDS

Contractor: JLM, LLC (Jenny Martens) MOA Control #:
Name of Company Contact Brad Eisel for #

Address: P.O. Box 2163 Petersburg AK 99833
Street or POB City State Zip + four

907 650-7026 - jlmllcservices@gmail.com
Area Code Phone # Fax # E-mail Address

Federal ID #: Or Soc. Sec. #: 574-28-0401 Alaska Business License #:
Enter without Dashes Enter without Dashes

7/1/2024 6/30/2025 W-9 Attached W-9 Submitted Previously
Start Date (mmddyy) End Date (mmddyy) Verify with Brad Eisel

Contractor Agrees To: May 25, 2024: Provide professional school business services as per proposal dated
May 25, 2024 and additional services as agreed upon.
November 18, 2024: (update) To assist Business Office with FY24 Per Pupil Expenditure
Report and support Administrative Services Business Manager with answers to questions
for day-to-day business office questions.

W-9 Attachment

If additional space is needed, indicate here See attachment

District Contact Person: Terri Walker Phone #: (907)442-1802 Ext
Email Address: twalker@nwarctic.org Fax #:

District Agrees To: Pay contractor for requested services billed at \$110 per hour.

If additional space is needed, indicate here See attachment

Payment Terms: Payment to be made for invoiced services.

If additional space is needed, indicate here See attachment

Table with 2 columns: Enter Account Code as: and Amount. Rows include Account #: 100.099.550.000.410 (\$ 68,000.00), Account #: (blank) (\$), and Total: (\$ 68,000.00)

MOA Not to Exceed: \$68,000.00 Budget Authority Approval:

## Additional Conditions/Provisions

### **A - GENERAL INFORMATION**

1. All associated costs, not limited to fees and reimbursables, must be included in the MOA. All MOA's for more than \$50,000 require prior School Board approval before Contractor provides any service. (BP 3312)
2. The account to be charged must be determined and approved by the individual with budget authority prior to submission of the MOA to Brad Eisel. It is important to verify funds are available before submitting.
3. Prior to the starting date of the contracted services and/or activities, the Contractor and NWABSD must sign the MOA. The Contractor is not to be given a notice to proceed unless all the appropriate parties have approved and signed the MOA.
4. The District Contact Person will be responsible for obtaining the Contractor's signature and submitting the original MOA to Brad Eisel along with a W-9 for tax purposes.
5. The District Contact Person must approve for payment all Contractor invoices and verify receipts and backup documentation prior to submission for payment to the Accounting Department.
6. The Contractor must pay all expenses, and submit receipts for reimbursement, (airline receipt, hotel receipt, other travel related expenses). Mileage tickets are not eligible for reimbursement.
7. MOA's cannot be used for employee contracts or work agreements.
8. Any NWABSD employee who authorizes services prior to the required approvals may be subject to disciplinary action up to and including termination. (BP 4118, 4218)

### **B - CONTRACTOR RESPONSIBILITIES**

1. Check the MOA for contents and completeness. If the terms are agreeable, sign the agreement and return to the individual named as the Contact Person.
2. In accordance with the payment terms set forth on page 1, the Contractor shall submit a detailed invoice with the dates the services were provided and the appropriate documentation (copies of itineraries, airline tickets, hotel bills, ground transportation, etc.) to the District Contact Person for approval of payment. This **MOA Control #:** must be on the invoice.
3. As a condition of performance, the Contractor must pay all federal, state, and local taxes incurred by the Contractor.
4. A W-9 must be on file with the NWABSD or submitted with this MOA.
5. The Contractor must provide proof of any liability insurance coverage required on page 1 of this MOA.
6. To the extent allowed by law, the Contractor shall indemnify, defend, and hold the NWABSD harmless from any liability resulting from or arising out of the acts of the Contractor in the performance of this MOA.
7. This contract may be terminated by either party with a 30-day written notice.

I HEREBY ACCEPT THIS MOA AND THE CONDITIONS/PROVISIONS CONTAINED HEREIN.

**Any changes in the terms of this MOA must be on an ADDENDUM FORM prior to any services being performed. The ADDENDUM FORM must be approved by all parties.**

Deborah Walker

Asst. Director of Administrative Services – Fiscal  
Approval

Asst. Director's Signature

Date (mm/dd/yy)

Terri Walker

Superintendent – Authorized Signer NWABSD

Superintendent's Signature

Date (mm/dd/yy)

Jenny Martens

Contractor – JLM LLC.

Contractor's Signature

Date (mm/dd/yy)

## MEMORANDUM

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**TO:** NWABSD Board of Education  
Members

**DATE:** November 19, 2024

**NUMBER:** 25-035

**FR:** Office of the Superintendent

**SUBJECT:** Approval of DocuSign 3-  
Year Agreement  
Purchase

**STRATEGIC PLAN/BOARD GOAL:**

Track 1: Operational Improvements  
*Initiative: Optimize Business Practices*

**ABSTRACT:**

Board approval is required for purchases exceeding \$50,000.

**ISSUE:**

At issue is the purchase of the DocuSign 3-Year Agreement in the amount of \$149,938.00 to provide electronic agreements and signing as presented.

**BACKGROUND AND/OR PERTINENT INFORMATION:**

The NWABSD sought an electronic document signing program when the COVID-19 pandemic impacted in-person paper contract signing. The onboarding of DocuSign has continued and is currently used by schools and the following departments: Administrative Services, Technology, State & Federal Programs, Human Resources, Assistant Superintendent, and Student Services.

The 3-year agreement will allow the District to continue the DocuSign program with costs locked in and funding secured for the next three years through September 30, 2027.

Funding is available and budgeted in the FY25 Technology General Funds – Software .475.

**ALTERNATIVES:**

1. Purchase the DocuSign 3-Year Agreement in the amount of \$149,938.00 to provide electronic agreements and signatures as presented;
2. Do not purchase the DocuSign 3-Year Agreement as presented;
3. Take no final action.

**ADMINISTRATION'S RECOMMENDATION:**

The administration recommends that the Board purchase the DocuSign 3-Year Agreement for \$149,938.00 to provide electronic agreements and signatures as presented.



DocuSign, Inc.  
221 Main Street, Suite 1550  
San Francisco, CA 94105

**Offer Valid Through:** Sep 30, 2024

**Prepared By:** Jennifer Drouillard

**Quote Number:** Q-01600940

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## ORDER FORM

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### Address Information

**Bill To:**

Northwest Arctic Borough School District  
744 3rd Ave,  
Kotzebue, AK, 99752  
United States

**Ship To:**

Northwest Arctic Borough School District  
P.O. BOX 51,  
Kotzebue, AK, 99752-0051  
United States

**Billing Contact Name:**

Accounts Payable

**Billing Email Address:**

accountspayable@nwarctic.org

**Billing Phone:**

+1.907.442.3472

**Shipping Contact Name:**

Amy Eakin

**Shipping Email Address:**

aeakin@nwarctic.org

**Shipping Phone:**

(907) 442-1830

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### Order Details

**Order Start Date:** Oct 1, 2024

**Order End Date:** Sep 30, 2027

**Billing Frequency:** Annual

**Payment Method:** Check

**Payment Terms:** Net 30

**Currency:** USD

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### Products

Product Name	Subscription No.	Start Date	End Date	Quantity	Net Price
eSignature Enterprise Pro Edition - Envelope Subs.	SUB-1533738-1	Oct 1, 2024	Sep 30, 2027	30,000	\$120,900.00
Multi-Channel Delivery	SUB-1533738-1	Oct 1, 2024	Sep 30, 2027	5,000	\$2,000.00
Enterprise Premier Support - eSign	SUB-1533738-1	Oct 1, 2024	Sep 30, 2027	1	\$27,038.00

**Grand Total: \$149,938.00**

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### Annualized Total

Year 1 Total: \$49,979.33

Year 2 Total: \$49,979.33

Year 3 Total: \$49,979.33



The annualized totals above are displayed for general guidance only and may differ from the total amounts displayed on an invoice. Please refer to the Order Details and Products sections above for complete and accurate totals.

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### **Product Details**

eSignature Envelope Allowance: 30,000

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### **Overage/Usage Fees**

eSignature Enterprise Pro Edition - Envelope Subs. (Per Transaction): \$8.80  
Multi-Channel Delivery: \$0.50

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### **Order Special Terms**

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### **Terms & Conditions**

This Order Form is governed by the terms Master Services Agreement available online at: <https://www.docusign.com/legal/terms-and-conditions/msa/pub-sec> and the applicable Service Schedule(s) and Attachments for the Docusign Services described herein available online at <https://www.docusign.com/legal/terms-and-conditions/msa-service-schedules>.

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### **Billing Information**

Prices shown above do not include any sales, use, value added (VAT), goods and services (GST), and/or any other similar taxes, duties, levies and or charges of any nature that might be imposed or required to be collected (collectively "taxes") by Docusign. Any such taxes are the responsibility of the Customer and will appear on the final invoice(s), as applicable. Taxes are calculated based on the ship-to location listed on your order form.

Invoice(s) for this order will be emailed automatically from [invoicing@erp.docusign.com](mailto:invoicing@erp.docusign.com).

Please make sure this email address is on an approved setting or safe senders list, so notifications do not go to a junk folder or get caught in a spam filter.

**For U.S. Customers**

Is the contracting entity exempt from sales tax?

Please select Yes or No:

If yes, please send the required tax exemption documents immediately to

[taxexempt@docusign.com](mailto:taxexempt@docusign.com).

**For Non U.S. Customers**

Verify that the VAT, GST, TIN, or similar tax identification number below is correct, or provide the correct number to your Docusign contact. If the VAT, GST, or TIN identification number is not populated below, it will be assumed that you are not a VAT/GST registered taxpayer.

VAT, GST, TIN or similar tax identification number:

**For other tax exemption requests, please email the applicable tax exemption documentation to [taxexempt@docusign.com](mailto:taxexempt@docusign.com).**

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**Purchase Order Information**

Is a Purchase Order ("PO") required for the purchase or payment of the products on this Order Form?

Please select:      Yes              No

By marking "No", Customer agrees to process payment for any invoices issued pursuant to this Order Form without a PO Number.

If yes, please complete the following information, and attach your PO (if available), and the invoice will be issued referencing such PO Number:

PO Number:

Please attach PO Attachment here:

If "Yes" is marked, but a PO Number is not provided or a PO document is not attached, then Customer agrees to provide the PO information or PO document to Docusign at its earliest convenience by sending to [POSubmission@docusign.com](mailto:POSubmission@docusign.com) referencing this Quote Number, but agrees to still process payment per the agreed upon terms.

If Customer has attached a PO (or other document) to this Order Form, Customer acknowledges and agrees that any additional or conflicting terms appearing in such PO (or any other document) are invalid.

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**By signing this Agreement, I certify that I am authorized to sign on behalf of the Customer and agree to the Terms and Conditions of this Order Form and any documents incorporated herein.**

**Customer**

Signature:

Name:

Job Title:

Date:

**DocuSign,  
Inc.**

Signature:

Name:

Job Title:

Date:

## MEMORANDUM

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**TO:** NWABSD Board of Education  
Members

**DATE:** November 15, 2024

**NUMBER:** 25-039

**FM:** Office of the Superintendent

**SUBJECT:** Approval of FY-25  
Contract; J & H Consulting

**STRATEGIC PLAN/BOARD GOAL:**

Support student-centered learning environments.

**ABSTRACT:**

Contracts exceeding \$50,000 requires Board approval.

**ISSUE:**

At issue is the approval of the FY-25 lobbyist contract with J & H Consulting in the amount not to exceed \$75,000.

**BACKGROUND AND/OR PERTINENT INFORMATION:**

The NWABSD has contracted with J & H Consulting, Reggie Joule and Christine Hess, to assist administration with NWABSD lobbying and legislative priorities during the legislative session. Critical issues to be addressed include adequate funding for possible construction, coordination of the legislative fly-ins and the legislative priorities of the NWABSD. Administration believes it is crucial that the school district maintain a presence with Juneau year-round to assist our representatives and lobbyists with district issues.

The contracted amount for services and related expenses is a total not to exceed \$75,000. Contract to begin January 1, 2025 – December 31, 2025.

**ALTERNATIVES:**

1. Approve the FY-25 lobbyist contract J & H Consulting in the amount not to exceed \$75,000.00 as presented;
2. Disapprove the FY-25 lobbyist contract with J & H Consulting as presented;
3. Take no action.

**ADMINISTRATION'S RECOMMENDATION:**

The administration recommends the Board approve the FY-25 lobbyist contact with J & H Consulting in the amount not to exceed \$75,000.00 as presented.

## **Instructions for Completing MOA Form**

1. You should have all of the information needed before completing and submitting the MOA. Please review the two-page MOA and if you have questions, contact Brad Eisel at 907-442-1822 or [beisel@nwarctic.org](mailto:beisel@nwarctic.org).
2. If you are not the budget authority (BA) for this MOA, please get the BA's approval as shown by their signature on page 1, prior to submitting for approvals.
3. In the "Contractor Agrees To" section, please be as detailed as possible in describing the services to be provided by the Contractor, such as number of training days, type of service, etc.
4. In the "District Agrees To" section, list in detail what the District is to provide the Contractor for their services, such as reimbursement of air travel, lodging, ground transportation, per diem, miscellaneous costs (i.e. copies and faxes), and cost of services, such as daily rate, flat fee, etc. Do not enter Payment terms in this section.
5. In the "Payment Terms" section, detail the instructions for the payment(s) to the Contractor (i.e. to be paid in 4 installments as work is performed and invoice is provided, or one payment at the completion of services when invoice is presented).
6. The MOA Control # is filled in on page 1 and on page 2 Section B, after MOA has all required approvals.
7. Remember to give yourself plenty of time to complete the MOA form and get the necessary approvals and signatures prior to having the services performed by the Contractor.
8. This contract may be terminated by either party with a 30-day written notice.

Northwest Arctic Borough School District

P. O. Box 51 Kotzebue, AK 99752

MEMORANDUM OF AGREEMENT (MOA)

MOA's for more than \$50,000 must be approved by the School Board prior to start of Contract
In a fiscal year MOA's to the same Contractor totaling more than \$50,000 must be approved by the School Board prior to start of Contract
Remember to follow federal procurement regulations when using federal funds to support the MOA

TAB BETWEEN FIELDS

Contractor: J&H Consulting LLC. MOA Control #:
Name of Company Contact Brad Eisel for #

Address: PO BOX 23293 JUNEAU AK 99802
Street or POB City State Zip + four

907 350-5057 -
Area Code Phone # Fax # E-mail Address

Federal ID #: Or Soc. Sec. #: Alaska Business License #:
Enter without Dashes Enter without Dashes

01/01/2024 12/31/2025 W-9 Attached W-9 Submitted Previously
Start Date (mmddyy) End Date (mmddyy) Verify with Brad Eisel

Contractor Agrees To: SEE ATTACHED STATEMENT

If additional space is needed, indicate here See attachment

District Contact Person: Terri Walker Phone #: 907-442-1802 Ext
Email Address: twalker@nwarctic.org Fax #: (907)442-2246

District Agrees To: Provide information as requested in order for the contractor to perform his services as
District Lobbyist and Consultant.

If additional space is needed, indicate here See attachment

Payment Terms: Payable upon completed work and submission of invoice(s).
Pay reimbursement as appropriate for any travel relevant to District needs as requested by the
Superintendent.

If additional space is needed, indicate here See attachment

Table with 2 columns: Account #, Amount. Total: \$ 75,000.00

MOA Not to Exceed: \$ 75,000.00 Budget Authority Approval:

## Additional Conditions/Provisions

### **A - GENERAL INFORMATION**

1. All associated costs, not limited to fees and reimbursables, must be included in the MOA. All MOA's for more than \$50,000 require prior School Board approval before Contractor provides any service. (BP 3312)
2. The account to be charged must be determined and approved by the individual with budget authority prior to submission of the MOA to Brad Eisel. It is important to verify funds are available before submitting.
3. Prior to the starting date of the contracted services and/or activities, the Contractor and NWABSD must sign the MOA. The Contractor is not to be given a notice to proceed unless all the appropriate parties have approved and signed the MOA.
4. The District Contact Person will be responsible for obtaining the Contractor's signature and submitting the original MOA to Brad Eisel along with a W-9 for tax purposes.
5. The District Contact Person must approve for payment all Contractor invoices and verify receipts and backup documentation prior to submission for payment to the Accounting Department.
6. The Contractor must pay all expenses, and submit receipts for reimbursement, (airline receipt, hotel receipt, other travel related expenses). Mileage tickets are not eligible for reimbursement.
7. MOA's cannot be used for employee contracts or work agreements.
8. Any NWABSD employee who authorizes services prior to the required approvals may be subject to disciplinary action up to and including termination. (BP 4118, 4218)

### **B - CONTRACTOR RESPONSIBILITIES**

1. Check the MOA for contents and completeness. If the terms are agreeable, sign the agreement and return to the individual named as the Contact Person.
2. In accordance with the payment terms set forth on page 1, the Contractor shall submit a detailed invoice with the dates the services were provided and the appropriate documentation (copies of itineraries, airline tickets, hotel bills, ground transportation, etc.) to the District Contact Person for approval of payment. This **MOA Control #:** must be on the invoice.
3. As a condition of performance, the Contractor must pay all federal, state, and local taxes incurred by the Contractor.
4. A W-9 must be on file with the NWABSD or submitted with this MOA.
5. The Contractor must provide proof of any liability insurance coverage required on page 1 of this MOA.
6. To the extent allowed by law, the Contractor shall indemnify, defend, and hold the NWABSD harmless from any liability resulting from or arising out of the acts of the Contractor in the performance of this MOA.
7. This contract may be terminated by either party with a 30-day written notice.

I HEREBY ACCEPT THIS MOA AND THE CONDITIONS/PROVISIONS CONTAINED HEREIN.

**Any changes in the terms of this MOA must be on an ADDENDUM FORM prior to any services being performed. The ADDENDUM FORM must be approved by all parties.**

Natalie Dickey

Business Office Manager of Administrative Services Fiscal  
Approval

Business Office Manager's Signature

Date (mm/dd/yy)

Terri Walker

Superintendent –Authorized Signer NWABSD

Superintendent's Signature

Date (mm/dd/yy)

Contractor

Contractor's Signature

Date (mm/dd/yy)

**PROPOSAL FOR  
NORTHWEST ARCTIC SCHOOL DISTRICT AND BOARD  
LOBBYING SERVICES  
Legislative Session 2025**

**J&H Consulting, LLC  
P.O. Box 23293  
Juneau, AK 99802  
and  
P.O. Box 673  
Kotzebue, AK 99752**

**Contact: Reggie Joule (907) 350-5057**



Greetings,

First, we would like to thank the Northwest Arctic Borough School District, all of the Board members, administration and Superintendent Walker for the opportunity to work with you the last seven years, it has been a pleasure. In fact, J&H Consulting is very proud that the NWABSD was one of our first clients. Our firm's objective is to work with our clients as partners in achieving your goals and objectives. We work with our clients in telling their unique story in such a way that targeted organizations want to assist our clients in reaching their goals. Luckily, the Northwest Arctic Borough School District (NWABSD) has a great story to tell with the district and Board successfully using innovative approaches for education delivery. For those of you that don't know us very well, the J&H principals are Christine Hess and Reggie Joule. Christine is an attorney, real estate developer, and lobbyist with extensive experience in state and local government. Reggie Joule served eight terms in the Alaska state legislature representing District 40, and one term as Mayor of the Northwest Arctic Borough. John Walsh has been lobbying many years and has roots in rural Alaska. The firm continues to maintain a wide network of relationships in the state capital and executive branch that provides access to timely information. J&H is one of the few lobbying firms that has lobbying experience on three levels: from within the legislature, from within a local government, and on behalf of private clients. This experience helps J&H effectively advance our clients' priorities.

We appreciate you taking the time to review our proposal.

Best Regards,

*Reggie Joule and Christine Hess*

Reggie Joule and Christine Hess, Partners  
J&H Consulting LLC

J&H uses a variety of methods and approaches to effectively lobby for our clients. First and foremost, we have established a large network within the legislature, the governor's office, and executive branch agencies, many of whom we have worked with for over twenty years. The J&H team has a reputation for working across party lines and meeting and respecting both the minority and majority caucuses, regardless of how political winds shift. We are known for finding common ground and building bridges between diverse groups and political positions to find commonsense solutions to problems. This work history brings the J&H team significant good will in Juneau. We have a history of working quietly behind the scenes to get results. We respect and pay attention to people at all levels of the political process, including the most junior staffers and even building staff, and we often gain unexpected access to information from this network. We utilize our network to help advance our clients' priorities.

J&H also believes that an important part of lobbying is effective messaging. Working with our clients, we analyze the client's history, priorities, and achievements, and then develop a clear message. We develop printed materials supporting the message and use these materials as tools during visits to the Capitol, leaving them in legislative offices to reinforce our face-to-face communications.

During session, J&H arranges client visits with legislators and the administration both in and out of the Capitol building. With our office location less than a block from the Capitol, informal sidewalk and coffee shop meetings have always enhanced our effectiveness. We work with our clients to reemphasize the developed message, maintain focus on client priorities, and to repeat the message as often as possible to decision makers. Throughout the session we maintain frequent contact with key legislators, the administration and our clients. We monitor all bills and budget items important to our clients.

J&H Consulting approaches the session in three quarters. For the upcoming year and legislative session, J&H Consulting proposes the following approach and strategy to accomplish its priorities:

Phase One - Preliminary Start, December 15<sup>th</sup> to January 30<sup>th</sup>. During phase one of the legislative session, J&H will work with the school district to accomplish the following:

- Establish priorities and goals, and meet with the NWABSD to ensure that we have a firm understanding of your needs;
- Establish a written and oral communication schedule with the NWABSD for the legislative session;
- Determine if there are any partners to work with in achieving the NWABSD's priorities like NWALT, conduct outreach, set up meetings to advance the client's interest;
- Develop a strategy to advance awareness of the NWABSD's accomplishments, priorities, and funding needs;
- Review all bills, including the operating and capital budgets, and flag bills to monitor and review with the school NWABSD. Determine whether bill amendments are needed, or legislation needs to be introduced and draft any needed language. Find sponsors to advance legislation or needed changes;

- Schedule an initial round of legislative and administrative visits to advance the NWABSD's priorities;
- Notify the school district of any meetings it should attend or chances to testify or provide written comments as appropriate, and assist with any written material as requested;
- Work with the representatives from the school district and board on advancing the NWABSD's priorities;
- Ensure the NWABSD's capital projects are included in the legislative budget database or are on DEED's capital construction and maintenance lists;
- Advocate on all levels for the NWABSDs outlined priorities;
- Attend relevant meetings and report to the NWABSD;
- Provide written and oral updates to client, maintaining a close working relationship with the NWABSD;
- When needed, engage in outreach and communication with the administration, state agencies, or other entities;
- Touch bases with legislative leadership on the strategy and plans for the legislative session; and
- Seek alliances with other organizations with similar priorities and perform outreach.

Phase Two - Middle Zone, February 1<sup>st</sup> to March 1<sup>st</sup>: This period is the monitoring period, when it is necessary to ensure that any legislation, including budgets, are making steady progress through the committee process. If any legislation is being held up, J&H will work to resolve problems and move the legislation forward. Adjustments to strategy may occur as needed and in consultation with the NWABSD. If a first round of visits did not occur by January 30<sup>th</sup>, it is essential that legislative and administrative visits take place at this point. If visits did take place, a second round of visits may occur to follow up on questions and to meet with a different group of legislators. During this phase, J&H will continue performing the tasks outlined above and also perform the following:

- Monitor all targeted bills and budget items and notify NWABSD of any progress;
- Bring any newly relevant introduced legislation to the NWABSD's attention. Propose, draft and find sponsors for any needed amendments;
- Attend relevant meetings and report to NWABSD. Provide written and oral updates to NWABSD;
- Schedule needed meetings with legislators or administration officials to keep priority legislation moving through the process, with a focus on committee members that are hearing or will hear priority legislation;
- Notify the NWABSD of any meetings it should attend or chances to testify or provide written comments as appropriate, and assist with any written material as requested;
- Revise legislative strategy as needed with client;
- Advocate for the NWABSD's priorities on all levels;
- Touch basis with legislative leadership on the strategy and plans for the legislative session;
- Continue to build relationships and alliances with legislators, the administration, and other organizations; and
- Provide written and oral updates to the client and maintain a close working relationship with the NWABSD.

End Game, March 1<sup>st</sup> to End of Session: This final phase of session requires a daily physical presence in the Capitol and active monitoring of all legislation and budgets, as legislation can change quickly and with little notice, especially after the 24-hour rule goes into effect. J&H will actively keep in contact with the NWABSD and any legislator carrying legislation or a capital or operating item that is a client priority, as well as checking in frequently with the leadership offices on the end game strategy. Any last-minute strategy adjustments will be made in consultation with the NWABSD. A final round of legislative visits may be arranged with a select group of key legislators or the administration as needed to get legislation passed. Contact with the NWABSD will be significantly increased during this period. All of the work outlined above will continue on an accelerated schedule. All work performed under the scope of work will be conducted with frequent client consultation. After session concludes, J&H Consulting will provide a final written presentation and an in-person presentation summarizing the legislative session. J&H would perform the same services for any special sessions.

Toward the end of session, planning for a legislative trip should begin. If the NWABSD wants J&H Consulting can work with other local organizations to arrange a legislative and administrative visit to the region.

### **Capital Budget Strategy:**

With the exception of last year, capital budgets recently have been small and comprised mainly of projects that are federally funded, requiring only a state match. It is important to recognize this factor when planning strategies. It will be important to provide legislators with a detailed and persuasive explanation of any proposed capital projects, and how it will benefit the NWABSD and State over the long term. Working with the NWABSD, we would develop a strong argument for any proposed capital project and how it will positively benefit both the economy of the area and of the State of Alaska as a whole. Next, working with the NWABSD, we would neatly package the information in a pamphlet or brochure that can be left with legislators and other staff. The same information will be used to input any projects into the capital legislative database, as projects must be in this database in order to be funded. Next, J&H Consulting will work with the NWABSD to inform key legislators and legislative leadership about the importance of funding the project. We would advocate funding the project through either the capital budget or any general obligation bond legislation. The last bond package was in 2012, and there has been discussion on advancing a bond package over the last several years. J&H Consulting will push for a bond package or a larger capital budget as a way to stimulate the economy and create jobs as Alaska bounces back from the pandemic. Another possibility of funding for any capital projects could be through federal legislation with funding coming either directly from the State of Alaska or the federal government. J&H Consulting has been tracking the proposed federal legislation proposed by President Biden to spend trillions on infrastructure. J&H Consulting will be ready to seek funding from this potential source as well. This strategy would be for any capital items that aren't included on DEED's school construction and maintenance lists that determine the order of funding for certain school projects. Advocacy for any DEED listed school construction or maintenance projects for the NWABSD will include advocating for enough funding that some of the school districts projects are included in the funding which happened last year for 2 of NWABSD projects!

**Fee Proposal:** We would propose a fee of \$70,000.00 for the year and direct reimbursement for airfare and hotel for any trips to Washington, D.C., Anchorage or Kotzebue for a legislative tour with a not to exceed amount of \$5,000.00. J&H Consulting will be fully responsible for paying our subcontractor, John Walsh.

**Conclusion:**

J&H is one of the few lobbying firms with experience on three levels: from within the state legislature as an elected official and chief of staff; from a local government perspective as a mayor, attorney, and government affairs director; and as a lobbying firm lobbying for the interests of private clients. Reggie has a total of 20 years of experience in advocacy or lobbying work on behalf of his constituents and clients. Christine has a total of 17 years of advocacy or lobbying work on behalf of constituents and clients, and a number of years of experience as an attorney advocating for the education community. John brings more years of experience and roots in rural Alaska. Many of our combined years of advocacy have been focused on the Northwest Arctic region. J&H Consulting is a small firm with a strong commitment to working with our clients to achieve their priorities. J&H Consulting thanks the NWABSD and Board for the opportunity to submit this proposal. We have really enjoyed working with the NWABSD and Board over the years.

Best regards,

*Christine Hess, John Walsh and Reggie Joule*