

NWABSD Board Committee Meetings  
Thursday, December 9, 2021 8:30 AM

Microsoft Teams  
744 Third Ave.  
Kotzebue, AK 99752

## **Agenda**

1. 8:30 a.m. Lobbying Committee Meeting  
**Presenter:** Megan Williams, Director of Administrative Services
2. 9:30 a.m. Curriculum Committee Meeting  
**Presenter:** Dana Orton, Director of Curriculum & Instruction
3. 11:00 a.m. Executive Session  
**Presenter:** Terri Walker, Superintendent
4. 1:00 p.m. Student Activities Committee Meeting  
**Presenter:** Brett Slaathaug, Student Activities Coordinator
5. 2:00 p.m. Board Policy Committee Meeting  
**Presenter:** Scott Lefebvre, Assistant Superintendent
6. 3:00 p.m. Budget Committee Meeting  
**Presenter:** Megan Williams, Director of Administrative Services
7. 4:00 p.m. Technology Committee Meeting  
**Presenter:** Amy Eakin, Director of Technology



# 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

### LOBBYING COMMITTEE MEETING

NOVEMBER 29, 2021  
8:30 A.M.

CONDUCTED VIA MICROSOFT TEAMS  
CALL-IN: 1-833-682-3239 or 907-308-3192 CODE: 623 583 422#

### AGENDA

- I. Lobbyist Proposal evaluation & selection for 2022-2023 contract:
  - J & H Consulting
  - Baker Professional Services
  - Blumer & Associates

**Committee Members:** Tillie Ticket, Brad Reich, Marie Greene, Millie Hawley, Margaret Hansen  
**Superintendent:** Terri Walker  
**Director of Administrative Service:** Megan Williams

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.

# **REQUEST FOR PROPOSALS LOBBYIST SERVICES**

**Release Date: October 1, 2021**

## **NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT**

776 Third Street  
P.O. Box 51  
Kotzebue, Alaska 99752  
Phone: 907-442-1800  
Fax: 907-442-3827

### **Address Inquiries to District Contact:**

**Megan Williams, Director of Administrative Services**  
**Direct: 907-442-1819**  
**Email: [mlwilliams@nwarctic.org](mailto:mlwilliams@nwarctic.org)**

Terri Walker, Superintendent

The Northwest Arctic Borough School District is soliciting proposals from experienced and qualified professionals who are interested in entering into a contract to work collaboratively with the Board of Education, Superintendent, and key staff members to represent the School District as a State & Federal Lobbyist.

It is the intent of this request for Proposals (RFP) to have the successful firm enter into a Professional Services Contract with the School District to provide the services outline in the proposal documents and includes, but is not limited to the follow:

In accordance with standards and criteria of the Northwest Arctic Borough School District, assist the District in furthering its legislative agenda and securing State & Federal funding.

**Period of Performance:** January 1, 2022 to December 31, 2023. The contract may be renewed annually for up to an additional three years. The District is required to advertise for a new term contract every five years.

**Submittal Requirements & Deadline:** Responses to this RFP are to be submitted electronically to Megan Williams, NWABSD Director of Administrative Services, at [mlwilliams@nwarctic.org](mailto:mlwilliams@nwarctic.org) by 1 p.m. November 1, 2021. It is the proposer's responsibility to receive confirmation that their Proposal was received by the District. Proposals received after that time shall not be considered.

**An electronic copy of the RFP document is available online at <https://www.nwarctic.org/RFP>.**

**Basis of Selection:** The selection will be based on the proposer's qualifications, experience, and references to provide lobbying support for programs and projects similar to those identified in the Scope of Services. The successful proposer should have experience with the Federal & Department of Education & Early Development's processes. Experience in rural Alaska is highly desirable. Selection and execution of any agreement will be accomplished in accordance with policies and procedures of Northwest Arctic Borough School District and the State of Alaska. An aggrieved respondent may appeal to the District requesting an administrative review of complaint for a redetermination of final award.

The Director Administrative Services may be contacted at [mlwilliams@nwarctic.org](mailto:mlwilliams@nwarctic.org) for the purpose of clarification of RFP requirements. The last day for questions is October 15, 2021. Any addenda will be issued by October 20, 2021.

**Statement of Services:** See attached Scope of Services.

**Right to Reject and Not Award:** The Northwest Arctic Borough School District reserves the right to not award the proposed agreement, if it is deemed in the School District's best interest.

**Affirmative Action/Equal Opportunity:** The NWABSD is an Affirmative Action/Equal Opportunity Employer. The NWABSD, and all contractors, vendors, and suppliers, agree and

certify that they shall comply with the requirement of all pertinent Federal and State laws relating to equal opportunity in contracting and procurement activities.

The contractor will serve as the District representative but will not execute contracts on behalf of the District. The contracting authority for the approval of contracts is the Northwest Arctic Borough School District, in accordance with District policies and procedure.

## **I. Scope of Services**

The contract consists of furnishing all labor, materials, equipment, tools, supervision, and any other facilities necessary to assist the Northwest Arctic Borough School District in accomplishing its State & Federal legislative goals.

All documents compiled or completed on behalf of the Northwest Arctic Borough School District shall be provided to the District in a format and on media approved by the District.

The individual or firm hired to perform the services will work under the direction of the Superintendent and School Board. The exact scope of services will be negotiated based on budget considerations and identified School Board priorities. Scope of services will include, at a minimum, the following:

- Set up meetings for communication with State & Federal legislators to include visits to our District.
- Assist District in searching for other sources of funding; which includes grant opportunities.
- Weekly updates pertaining to services performed to Superintendent & Board President.
- Report to Lobbying Committee & School Board.
- Advise and assist the Board in the development and execution of strategies for the purpose of developing and accomplishing the District's congressional and legislative priorities annually.

## **II. Proposal Format and Content**

Proposals which do not address the items listed in this section may be considered incomplete and may be deemed non-responsive by the District.

- Title Page (one page maximum). At a minimum, the title page shall show the name of the services being proposed (State Legislative Lobbying Services), the firm name, address, telephone number, name of contact person, and the date.
- Cover Letter which includes the following information:
  - A description of experience relevant to this Scope of Services
  - Description of strategy for accomplishing the goals and priorities of the District.
  - A complete list of other current clients and those served within the preceding twelve months of the submission date of this proposal.
  - A description of any conflicts, perceived or actual, which might impact the successful implementation of stated goals and priorities of the District.
  - A firm, fixed fee schedule for services performed, with total remuneration over the contract period.
- Current and accurate resume of the person or persons who will be principally responsible for providing services under the contract. Any contract resulting from this procurement will require that services be provided by the identified individual(s), with any change in personnel subject to approval by the District in its sole discretion.

- Letters of reference (at least three), preferably from Alaska School District's to which similar services have been provided by the individual(s) identified above within the last three years.

### **III. Evaluation Criteria and Selection Process**

The Northwest Arctic Borough School District reserves the right to reject any and all proposals submitted and shall not be liable for any costs incurred by any respondent in response to this solicitation or for any work done prior to the issuance of an executed contract.

The Lobbying Committee will review the proposals and will then make a recommendation to the full Board. In addition to reviewing the written proposals, the committee may investigate a proposer's prior work experience and performance, including projects referenced in the proposal and available written evaluations, and may contact listed references or other persons knowledgeable of a respondent's past performance. Factors such as overall experience relative to the proposed contract, quality of work, cost control, and the ability to meet schedules may be addressed during the evaluation.

Through this process, proposals will be ranked according to the following criteria:

- Completeness of proposal (as per Proposal Format and Guidelines) – 10 points
- Respondent's experience (past performance, work products, timeliness) – 25 points
- References – 10 points
- Fee schedule/budget proposal – 25 points
- Strategy for accomplishing goals and priorities for the District – 30 points

The Northwest Arctic Borough School District reserves the right to award a contract to the highest ranked firm based solely on the written proposal or request oral interviews with a "short list" of the highest ranked firms. The Northwest Arctic Borough School District reserves the right to terminate negotiations with any proposer should it be in the District's best interest.

### **IV. General Requirements**

The following information is presented as a general guideline for the preparation of the proposals. To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposals address all the items described in the Section II, Proposal Format and Content. Proposals that do not address these items may be considered incomplete and may be deemed non-responsive by the District.

NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT  
REQUEST FOR PROPOSALS FOR LOBBYIST SERVICES  
**ADDENDUM #1**

- 1- NWABSD currently employs multiple Lobbyists. With this RFP will the District consider only a single contractor?
  - No, the lobbying committee will review the proposals and will make a recommendation to the full Board based on our District needs.

# **Proposal**

***State Legislative and Federal Lobbying Services  
Northwest Arctic Borough School District  
November 1, 2021***

*From*

***Baker Professional Services  
Andy Baker  
P.O. Box 116  
Kotzebue Alaska 99752  
907-223-8167 b.andy.baker@gmail.com***

# ***Baker Professional Services***

P.O. Box 116

Kotzebue Alaska 99752

907-223-8167 b.andy.baker@gmail.com

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November 1, 2021

Northwest Arctic Borough School District

Dear Board of Directors

I would like to thank you for this opportunity to express my interest in representing the Northwest Arctic Borough School District as your Lobbyist in Alaska and Washington D.C.

I have previously represented the NWABSD Lobbying for roughly 15 years and six Superintendents.

My Company has two overwhelming qualities.

1. I live here and I care about the quality of Education in Northwest Arctic. I went to School here, my Kids went to School here and now my Grand Children are going to School here. I have a personal vested interest in the School District doing well.
2. My Company is founded and based in the Northwest Arctic Borough for the past twenty plus years and I have worked diligently my whole life to support and enhance the quality of life for the People of our Region, this has allowed me to understand the issues intimately in order to help find practical solutions for improvement.

## **Experience**

I have been Lobbying and or Consulting for over twenty years both in State and Federally. Over the past several years I have met with four different Federal Secretaries and with the Secretary of Education three times. I have also worked on education issues with the BIA and Dept. of Labor. I have a very close relationship with all of our Federal Delegation and I am in contact with them and their Chief of Staffs at least bi-weekly if not more often. I am very comfortably and spend a lot of time in Washington DC. In State I am very well connected in the Legislature and work very closely with the Governor and his Administration. I work very closely with the Governors Chief of Staff and Commissioners and know and work with Commissioner Johnson very well. I have been very successful getting results year round from the administration rather than just waiting for the Legislature as the only option.

## **Strategy**

**I feel that the key to success is first working with the client to figure out priorities and then together implementing a plan and working as a team for success.**

- Define the issue / Project needed
- Establish talking points and justification
- Board, Staff and Lobbyist Meet with Legislators / Administration or Federal Delegation / Departments
- Bring Officials to the Region to meet people and have a personal connection to our requests
- Repeatedly following up and pushing

## **Past Experience Highlights**

- Past president Northwest Arctic Borough Assembly, five years
- Part of founding team of NWALT and its concept
- Part of the team that came up with the Bond package for new schools in NWABSD
- Part of team to bring in \$100 million of new Schools to the NWABSD
- Part of the team getting the funding for Star of the Northwest dorm
- Part of the team to get the funding for the ATC expansion and dorm retrofit
- Part of team to deliver an increase of \$62 million per year to North Slope Borough from Oil/Gas property taxes rewrite

## **Statement of No Conflict**

There is no conflict with Baker Professional Services entering into an agreement with the NWABSD.

## **Fee Schedule**

\$72,000.00 per year

Paid @ \$6,000.00 per month for 12 months

No Reimbursable expenses will be charged

Thank you for the opportunity to submit a proposal for your Lobbying services, I would enjoy and appreciate the opportunity to discuss your issues and my ideas further.

Sincerely



Andy Baker

## List of Experience

### Current Clients over the past 12 months

City of Kiana

-State and Federal

Voice of the Arctic

-State and Federal

Trilogy Metals

-State and Federal

### Past Clients

Northwest Arctic Borough School District

-Lead Lobbyist State and Federal

North Slope Borough

-Lead Lobbyist State and Federal

Northwest Arctic Borough

-Lead Lobbyist State and Federal

Arctic Slope Regional Corporation

-State Lobbyist

Teck

-State Lobbyist

Maniilaq

-State and Federal Lobbyist

SHELL

-State Lobbyist

Nova Copper

-State Lobbyist

## *References*

*Norman Eck, Past Superintendent NWABSD  
520-610-9462*

*Chad Padgett, State Director Senator Sullivan's office  
907-671-6081*

*Jerry Covey, Past Commissioner DEED  
907-440-6500*

# Andy Baker

907-223-8167 | b.andy.baker@gmail.com | Kotzebue, AK 99752

## SUMMARY

Poised lobbyist with over twenty years of experience in developing strategies to help Organizations and Communities to create priorities and select projects and then to successfully get them funded.

## SKILLS

- Revenue generation
- Team building and leadership
- Planning and coordination
- Strategy development
- Troubleshooting
- Flexible

## EXPERIENCE

President, Baker Professional Services, May 1996-Current  
Kotzebue , AK

- Collaborated with community groups, government entities and general public to advance goals and operational effectiveness of the clients.
- Prioritized and organized tasks to efficiently accomplish service goals.
- Demonstrated self-reliance by meeting and exceeding workflow needs.

## EDUCATION AND TRAINING

High School Diploma  
Kotzebue High School

## ACCOMPLISHMENTS

- Past president Northwest Arctic Borough Assembly, five years
- Part of founding team of NWALT and its concept
- Part of the team that came up with the Bond package for new schools in NWABSD
- Part of team to bring in \$100 million of new Schools to the NWABSD
- Part of the team getting the funding for Star of the Northwest dorm
- Part of the team to get the funding for the ATC expansion and dorm retrofit
- Part of team to deliver an increase of \$62 million per year to North Slope Borough from Oil/Gas property taxes rewrite

RFP Scoring & Evaluation – Lobbyist Services

Baker Professional Services

	Score	Notes:
Completeness of proposal (as per Proposal Format & Guidelines) – 10 points	<b>/10</b>	
Respondent's experience (past performance, work products, timeliness) – 25 points	<b>/25</b>	
References – 10 points	<b>/10</b>	
Fee Schedule/budget proposal – 25 points	<b>/25</b>	
Strategy for accomplishing goals and priorities for the District – 30 points	<b>/30</b>	
<b>TOTAL:</b>	<b>/100</b>	

Dianne Blumer

Brad Gilman, Rick Marks and Sebastian O'Kelly

BLUMER & ASSOCIATES

ROBERTSON, MONAGLE & CASTALIGH

6058 Azalea Drive, Anchorage AK 99516  
(907) 575-2279

405 Talahi Rd. Vienna, VA 22180  
(703)-577-2187

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Government Relations | Consulting | Lobbying Services

**PROPOSAL FOR STATE AND FEDERAL LOBBYING SERVICES**

October 29, 2021

Dianne Blumer

Brad Gilman, Rick Marks and Sebastian O'Kelly

BLUMER & ASSOCIATES

ROBERTSON, MONAGLE & EASTAUGH

6058 Azulea Drive, Anchorage, AK 99516  
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(703) 577-2187

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Government Relations | Consulting | Lobbying Services

October 29, 2021

Megan Williams  
Director of Administrative Services  
776 Third Street  
P.O. Box 51  
Kotzebue, Alaska 99752

Subject: Joint Northwest Arctic Borough School District Lobbying Services Proposal from Blumer and Associates and Robertson Monagle & Eastaugh (ROMEA)

Dear Ms. Williams,

Dianne Blumer of Blumer & Associates and Brad Gilman, Rick Marks and Sebastian O'Kelly of Robertson Monagle & Eastaugh are pleased to offer this joint proposal to provide state and federal legislative lobbying services to the Northwest Arctic Borough School District.

As the principal of Blumer & Associates, Dianne Blumer qualifies under the definition of a Women-Owned/Minority Enterprise and offers over fifteen years of federal, state and local experience, including recent direct advocacy on behalf of local governmental clients. Ms. Blumer also maintains outstanding relationships with members of Alaska's congressional delegation, the governor and his cabinet, and members of the Alaska State Legislature, including leadership in both houses and on both sides of the aisle.

Dianne Blumer has provided governmental affairs and lobbying services to the Alaska Municipal League and other cities over the last several years, including several rural Alaska communities. She has successfully advocated on their behalf for independent capital requests, as well as their budget priorities. In addition, she has found great success for clients in various cities in attaining their local government priorities, including the PERS/TRS employer contribution rate, community assistance and revenue sharing, policies supporting maximum local control, and has worked to block efforts to shift costs from state to local governments.

Blumer & Associates possesses the bipartisan professional relationships to ensure that the Northwest Arctic Borough School District priorities and concerns are precisely communicated in a way that drives positive outcomes. Beginning as an associate of Mr. Gillespie in 2018, and subsequently working independently, she has become fluent in local government priorities and resolutions on key issues.

As the Commissioner of the Department of Labor and Workforce Development, Dianne was responsible for developing grant funding and educational programs relating to workforce development and the post-secondary education, becoming familiar with both federal and Alaska Department of Education and Early Development processes, including the sources for both state and federal grants for educational programs.

Prior positions held by Ms. Blumer include, Chief of Staff and Policy Advisor in the Legislature and as previously mentioned, executive level management positions in the administration, including a cabinet level appointment by a former Alaska governor as the Commissioner of Labor and Workforce Development.

In addition to the professional experience, recent executive branch and legislative experience, Dianne also offers professionalism, integrity and a careers-worth of rich relationships with statewide bipartisan contacts. Her office maintains a manageable workload allowing for personalized service with each of her clients.

Brad Gilman, Rick Marks and Sebastian O'Kelly are professionals with Robertson, Monagle & Eastaugh (referred to below as "ROMEA" or "Firm"), a lobbying firm based in the DC-area with Alaska roots with over 80 years of combined government relations experience working with Congress and the Executive Branch. The firm has extensive legislative experience in both the federal authorization and appropriations process on behalf of its clients.

ROMEA has a number of client projects pending in the Fiscal Year (FY) 2022 House and Senate Appropriations Bills, which this year includes the reinstatement of project earmarks to state and local governments (including local governmental entities like schools and non-profits). The Alaska Congressional Delegation typically seeks submission of community project requests by mid-March at the latest in order to be in sync with the annual federal appropriations cycle. ROMEA staff will assist the district to develop its requests, fill out the required forms, directly advocate, and track the results. They will also track closely the availability of federal grant opportunities and will advise on client grant applications, but do not write grants.

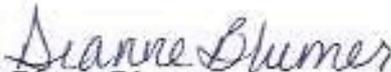
In addition, the firm can work to develop submissions to the Alaska Congressional Delegation for projects designated in the Labor, HHS and Education Appropriations Bill

for FY 2023 for early learning, elementary and secondary education initiatives and activities. Bills that should be enacted later this year or in early 2022 include project funding ranging from \$50,000 to \$2,000,000, with most projects in the \$200,000 to \$500,000 range. Examples of projects include – student wraparound services; tutoring support; robotics equipment purchases; STEM education; indigenous language immersion; afterschool services; apprenticeship learning, among other activities. ROMEA has also been keeping its local government clients informed about education funding contained in the various COVID Relief Bills that have been enacted over the last 18 months, along with school public health requirements, and would do the same for the district.

Dianne Blumer of Blumer & Associates will serve as prime contractor, with subcontracted services from Robertson, Monagle & Eastaugh. Together, we are committed to devoting the time, energy, resources and legwork necessary to fulfill the scope and parameters of this proposal.

We are confident this proposal addresses each element of the proposed scope of work, including qualifications, and demonstrated successful outcomes for current and prior clients, and is submitted with the utmost sincerity of interest. If we can provide any more information as you go through the review process, please do not hesitate to let us know.

Sincerely,

  
Dianne Blumer

Blumer & Associates

Dianne Blumer  
BLUMER & ASSOCIATES  
6058 Azalea Drive, Anchorage AK 99516  
(907) 515-2279

Brad Gilman, Rick Marks and Sebastian O'Kelly  
ROBERTSON, MONAGLE & EASTAUGH  
105 Talahi Rd, Vienna, VA 22180  
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**NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT  
STATE AND FEDERAL LOBBYING SERVICES 2022 - 2023  
PROPOSAL SUBMISSION**

**EXECUTIVE SUMMARY**

Blumer & Associates/ Dianne Blumer has successfully provided professional governmental relations consulting and advocacy for 15 years with proficiencies that include public policy, municipal government, health care, finance, and taxation.

Dianne is a homegrown Alaskan with 26 years of executive and legislative experience. She brings an array of professional experience with state government executive and legislative branches. In addition to her recent experience as Chief of Staff and Senior Policy Adviser with the Alaska State Legislature, she served as Commissioner of the Department of Labor and Workforce Development managing issues including Alaska labor laws, workers compensation, and vocational rehabilitation. Dianne was also responsible for developing and administering workforce development and post-secondary education grant funding programs. In that capacity Dianne became familiarized with both federal and Alaska Department of Education and Early Development processes, including the sources for both state and federal grants for workforce development and educational programs. She is competent in public policy, regulatory processes, and labor laws, including advocating on behalf of management in collective bargaining.

Brad Gilman, Rick Marks and Sebastian O'Kelly are professionals with Robertson, Monagle & Eastaugh (referred to below as "ROMEA" or "Firm"), a lobbying firm based in the DC-area with Alaska roots. The three of them have over 80 years of combined government relations experience working with Congress and the Executive Branch, primarily in the issue areas of coastal infrastructure development, maritime, fisheries, defense, transportation, and other natural resources (including energy). Their prior experience includes service in the Federal government in both the Congress and Executive Branches.

Collectively this team prides itself in providing bipartisan, high quality, dedicated counsel, advice, and advocacy for our clients with an understanding that credibility, meaningful relationships, and hard work are critical elements of successful lobbying. We would welcome an opportunity to enter an agreement with the Northwest Arctic Borough School District (NWABSD).

## **RELEVANT SKILLS AND EXPERIENCE**

### **Dianne Blumer**

Dianne is the Principal and Owner of Blumer & Associates, a full-service consulting and lobbying firm that specializes in public affairs and government relations with a focus on state and local government organizations that require advocacy assistance with the Alaska State Legislature and executive branches of government.

Dianne has served in the Alaska State Legislature as the Chief of Staff and Policy Adviser, drafting policy, scheduling and preparing testimony, testifying and negotiating with legislators to ensure successful and desired outcomes.

She has a keen understanding of the legislative and executive branch processes and is a subject matter expert on Alaska State Statutes, budgets, and regulations. She also prides herself with the ability to work with legislators on both sides of the aisle, as well as a broad range of public and private stakeholders across the state.

In 2012 Dianne was appointed to serve as Commissioner of the Department of Labor and Workforce Development. During her tenure she was responsible for developing education and workforce development grant funding programs and successfully developed apprenticeship programs in several communities for former prisoners, giving them an opportunity to gain valuable skills, connect with potential employers, and ultimately improve their quality of life.

She also worked closely with the members of local governments to ensure that workforce development program funding was distributed to best meet the needs of Alaskans. Her appointment as commissioner required an extensive understanding of legislative and state administrative processes as well as the skills necessary to lobby the legislature, defend her department's programs, and advocate for the funds necessary to keep them up and running.

As a lobbyist, she has represented several Alaskan cities and boroughs, including rural Alaska, on capital projects, municipal issues, taxes, local planning, and education issues. She is skilled in analyzing public policy issues and implications on behalf of her clients to achieve the best outcome.

As a female principal of Blumer & Associates, Dianne qualifies under the definition of a Women-Owned/Minority Enterprise.

### **Brad Gilman**

Brad Gilman grew up in Seward and is the son of Don Gilman who served as a State Senator for the Kenai Peninsula and as the Mayor of the Kenai Peninsula Borough for over twenty-five years. Brad attended Georgetown University (1977-81) and graduated from the School of Foreign Service. While at Georgetown, he worked as a paid intern for

Senator Ted Stevens. He subsequently worked for Senator Stevens on the Senate Commerce Committee, handling maritime and fisheries issues. During this period, Brad attended the George Washington University night law school, earning a law degree in 1987. Brad is the Vice President of Robertson, Monagle & Eastaugh with offices in Reston, Virginia and Washington, D.C. His extensive advocacy experience includes, but is not limited to, representing Alaska municipalities in seeking federal infrastructure funding for harbors, airports, roads, hospitals, community facilities, water systems, and wastewater systems. It also includes representing Alaskan municipalities on policy issues, among others, relating to federal fisheries and natural resource management, homeland security, Native American issues, secure rural schools, payment-in-lieu-of-taxes, rural aviation services, and rural postal services.

### **Sebastian O'Kelly**

Sebastian O'Kelly has been a consultant to the law firm of Robertson, Monagle & Eastaugh for nearly twenty years and has over thirty years of experience in Washington, serving in both the executive and legislative branches, as well as working in government relations. His background covers a broad range of issues, with a particular expertise in natural resources, appropriations, energy, maritime, fisheries and space issues. He also assists the firm's Alaska community clients in securing Federal funding for Army Corps, transportation and other public infrastructure projects. O'Kelly's legislative experience spanned nearly a decade in the 1990s as professional staff on the Senate Committee on Governmental Affairs serving Senator John Glenn. He played a key role in a number of the Committee's legislative achievements, including enactment of S. 1, the Unfunded Mandates Reform Act, in the 104<sup>th</sup> Congress.

### **Rick E. Marks**

Mr. Marks is a Principal at ROMEA with 30 years of government relations, scientific and natural resource management experience. As a trained biologist, Mr. Marks provides ROMEA with scientific as well as political skills to serve multiple Client needs. He provides comprehensive advocacy services for a variety of clients in the areas of federal appropriations/grants/economic development, municipal/harbor infrastructure needs, esp. in coastal communities, and Native issues. Mr. Marks also has extensive interactions with State/Federal/Tribal managers regarding natural resources and other related issues. Mr. Marks has a Master of Science Degree from Stony Brook University in Marine Environmental Science with emphasis in Coastal Fish Ecology.

### **LEGISLATIVE OUTCOMES - BLUMER & ASSOCIATES**

- Defend Revenue Sharing/Community Assistance and helped secure an additional \$8M in FY 18, and \$4M in FY 19, as well as an additional \$30M to the PCE to stabilize the annual funding level
- Secure funding for City of Kodiak fire hall

- Defend the PERS contribution rate of 22% for municipalities against numerous efforts to shift costs to local governments by increasing the contribution rate
- Assist in passage of legislation allowing the release of hunting and fishing records to municipalities
- Passage of legislation allowing publicly owned emergency transport services to receive Medicaid reimbursements
- Advocate for passage of legislation allowing municipalities to offer tax exemptions on deteriorated residential property and newly subdivided property to allow for development
- Advocate for local municipal control relating to the Transportation Network Companies legislation in both 2017 and 2018 Sessions
- Play key role in the passage of legislation related to abandonment of derelict vessels
- Block the passage of legislation imposing an increase in the registration fees for municipally owned vehicles
- Advocate in the passage of legislation related to railbelt utilities
- Advocate in the passage of legislation related to transportation of live crab.

#### **LEGISLATIVE OUTCOMES - ROBERTSON MONAGLE & EASTAUGH**

- Represent Alaska municipalities in seeking federal infrastructure funding for harbors, airports, roads, hospitals, community facilities, water systems, and wastewater systems.
- Represent Alaskan municipalities on policy issues, among others, relating to federal fisheries and natural resource management, homeland security, Native American issues, secure rural schools, payment-in-lieu-of-taxes, rural aviation services, and rural postal services.
- Represent fishermen and fish processors on federal fisheries management issues, including Magnuson-Stevens Act; individual statutes governing specific fisheries (American Fisheries Act, Dungeness Crab Management Act, etc.); and implementing regulations and funding

- Represent an interstate marine fisheries commission on policies relating to fisheries data collection, federal management of marine mammals, and fisheries disaster assistance to the West Coast.
- Represent Gulf Coast shipbuilders in seeking Department of Defense funding for specific shipbuilding projects, and on policy issues governing domestic shipbuilding.
- Represent marine life research and public education center in support of NOAA marine mammal programs.

## **UNDERSTANDING SCOPE OF SERVICES**

Blumer & Associates (Contractor) in collaboration with Robertson, Monagle & Eastaugh will advise the Northwest Arctic Borough School District (Client) on strategy and tactics throughout the term of this agreement. Dianne Blumer will provide all state lobbying services, including identification, prioritization, monitoring and engagement on all relevant legislation, and budget processes and will advocate for capital projects and state regulations related to the Client's interests. Contractor will arrange all necessary meetings, facilitate testimony, track hearings, and legislative activity related to the Client's interests. Contractor will also provide general consulting and advocacy services as appropriate and directed by the Client.

Blumer & Associates and Robertson, Monagle & Eastaugh have extensive experience working on behalf of public entities and associations, and will keep the Client apprised of relevant issues of interest using our unique communication and reporting skills, including an ongoing dialogue with the client as required, weekly updates during the legislative session detailing committee meeting schedules and bill status, and monthly written reports related to legislative activity during the session. These communications also include matters that relate to the client outside the legislative and congressional sessions, including legislation, regulatory concerns and communication with Alaska's Congressional Delegation, the Governor of Alaska, his staff and the Administration.

Our strategy to achieving the Client's governmental relations and capital funding goals and priorities include the following:

- Understand, articulate, and marshal regulatory and legislative public policy to support Client's priorities
- Develop a cohesive legislative strategy working with the Clients leadership
- Identify a timeline for tasks to be accomplished each week/month of the session

- Work with the Client's leadership to identify legislative allies and schedule meetings as directed
- Prepare written summaries of policy positions, legislation, and arguments supporting the Client's positions
- Seek advice and counsel from supporters and allies
- Work with the Client's leadership and staff to identify strategies to overcome or avoid impediments to achieving legislative objectives
- Educate legislative and executive branch leadership on the Client's priorities
- Form alliances and strengthen relationships where possible
- Provide reports on legislative activity and key issues during the legislative session
- Provide written or oral reports during the interim on an as needed basis
- Attend and report on legislative processes and current events at council meetings as requested.
- ROMEA will provide regular communications to the District on issues related to the Federal agenda. This includes quarterly written reports on the agenda, as well as information on other Federal developments affecting Alaska and its communities. Communication may also be less formal through normal business communications (phone, Zoom and conference calls, email, PDFs, etc.). ROMEA visits its AK community clients every year or other year and can include the District if the District would like to see one of them in person. ROMEA can also provide public briefings to the District over Zoom.
- ROMEA will advise on timing, schedule meetings with appropriate federal and Congressional officials, prepare memoranda and background materials, and attend the meetings in Washington, DC. While the Firm encourages DC visits, for 2020 and 2021, they have been on hold amid the pandemic, and it is still unclear what the 2022 calendar for hill visits will look like. While the Firm covers local and Alaska travel expenses, any travel/lodging costs to DC by District members would be the District's responsibility.

- The Firm agrees to collaborate with other lobbying firms, law firms, consultants, associations, businesses, municipal and regional groups as directed by the District. In this case, we will be working with Blumer & Associates who we know well and collaborate with for some of our other clients. As noted above, the Firm has existing Alaska municipal, borough, maritime and fisheries clients.

#### **BLUMER & ASSOCIATES CURRENT & PREVIOUS CLIENTS**

American Institute of Architects, Alaska  
 City of Unalaska  
 Associated General Contractors  
 North Star Behavioral Health Systems  
 Alaska Municipal League  
 Matanuska Electric Association  
 City of Kodiak  
 Ounalashka Corporation  
 Tanadgusix Corporation  
 GKC Holdings

#### **ROBERTSON MONAGLE & EASTAUGH MUNICIPAL CLIENTS**

Unalaska, AK  
 Seward, AK  
 Petersburg, AK  
 Wrangell, AK  
 Kodiak, AK  
 Kodiak Island, AK  
 Aleutians East, AK  
 Whittier, AK  
 Marathon, FL

ROMEA also represents clients in the fisheries and maritime industry as well as a tribal government, native village corporation, an interstate marine fisheries commission and a non-profit marine mammal research and education center. They can provide a list of these other clients upon request.

#### **POTENTIAL CONFLICT OF INTERESTS**

There are no apparent conflicts of interests. Although an unlikely occurrence, if there is a conflict of interest between either Blumer & Associates and the Firm and the District, we will be transparent in disclosing that conflict. We will work with the District and the other client to either negotiate the conflict or recuse ourselves from that particular issue.

**REFERENCES**

Attached are written letters of recommendation as requested.

**PRIMARY CONTACT**

Dianne Blumer, Blumer & Associates  
6058 Azalea Dr., Anchorage, Alaska 99516  
(907) 575-2279

**COMPENSATION AND EXPENSES**

The compensation for services will be \$87,000.00 annually.

Reasonable out of pocket expenses will be reimbursed by the NWABSD, not to exceed \$250.00 per month. NWABSD must approve expenses, which exceed this limit and travel expenses, in advance.

The Contractor will be reimbursed for the APOC lobbyist registration fee of \$250.00.

Contractor will invoice the Company monthly for fees and expenses.

**TERMS OF AGREEMENT**

The term of this agreement is from January 1, 2022 to December 31, 2023, unless otherwise negotiated by the parties.

The agreement shall remain in full force and effect, unless terminated or annulled by mutual consent of the parties, with the exception of termination for cause. Potential causes for termination may include, dishonesty, theft or other excessive unbecoming professional behavior.

The agreement may be modified or amended in writing if both parties sign such amendment.

The laws of Alaska shall govern the agreement.

SIGNED:

DIANNE BLUMER, BLUMER & ASSOCIATES

*Dianne Blumer*

10/29/21  
Date

\_\_\_\_\_  
Date

AGS/MG

10/29/21  
Date



## Office of the Mayor and City Council

710 Mill Bay Road, Room 111, Kodiak, Alaska 99615

August 17, 2020

Re: Letter of Recommendation for Dianne Blumer and Associates

To Whom It May Concern:

This letter serves as a recommendation for Dianne Blumer and Associates for lobbying work. Ms. Blumer was hired two years ago as the state lobbyist for the City of Kodiak. We have found her and her work to be excellent, especially with legislative and budget details and as well as following up with these items.

In my role as Past President of the Alaska Municipal League (AML), I have also worked with Ms. Blumer and her company in closely following bills and budget items of importance to the 165 AML members. She and her associates have done excellent work for AML and they continue to do so.

If you have any questions, please feel free to contact me at my City email: [pbranson@city.kodiak.ak.us](mailto:pbranson@city.kodiak.ak.us).

Sincerely,

Pat Branson, Mayor  
City of Kodiak



DENALIDANIELS  
+ ASSOCIATES

LETTER OF RECOMMENDATION

August 20, 2020

To whom it may concern:

This letter of recommendation is offered regarding Ms. Dianne Blumer. My name is Denali Daniels and I am a lifelong Alaskan; born, raised, and educated in the state. Since 2012 I have been growing a consulting business providing clients with strategic planning, facilitation and government affairs services.

I have known Ms. Blumer for several years, and two years ago I expanded my company's capacity to include her lobbying support for an important client to help pass milestone legislation relating to railbelt utilities. During a time while my business was expanding, it was critical to have someone on my team that I could trust and someone with a stellar reputation in Juneau. Ms. Blumer has been an incredible asset to our team and has an extensive track record of passing legislation. I am pleased to share that Senate Bill 123 passed last session on her watch.

Ms. Blumer is a respected lobbyist in the capitol building. In addition to passing SB123 and other legislation on behalf of her clients, she adeptly schedules meetings with key decision makers in the executive branch and has strong relationships with legislators on both sides of the aisle. She has been helpful in monitoring and influencing key appointments to boards and commissions, influencing budget decisions and when the time comes to hold meetings, you can rely on Dianne to organize your schedule with the right people at the right time. She is responsive and you can trust her to follow through. Finally, her input on strategy is invaluable and always spot on.

Thank you for your consideration.

Sincerely,

Denali Daniels  
Consultant and Principal

Frank Kelty  
43915 Via Granada  
Palm Desert, CA 92211

August 13, 2020

Subject: Reference for Ms. Dianne Blumer

To Whom It May Concern:

My name is Frank Kelty a former longtime Mayor for the City of Unalaska, I also worked for 30 years in the Alaska Seafood industry and until recently I was a 50-year resident of Unalaska, Alaska. I am writing to you as a reference for Ms. Blumer who may be applying for a position within your organization. I know Dianne for 4 years personally but have known of her for many more years. Currently, she is serving the City of Unalaska, as our State of Alaska Lobbyist. I was involved as Unalaska Mayor along with the City Council in hiring Diane for that position. In my opinion, Dianne has done outstanding job representing Unalaska. She is very professional, knowledgeable, and has many years of experience in the workings of state and municipal government. She has held a wide range of positions over the years. I will touch on a few; she served as the Commissioner of the State of Alaska Department of Labor a cabinet level position, she served as a senior policy advisor for Governor Shawn Parnell and served as a Deputy Director for the Department of Revenue and for the Department of Labor. She has also work as and legislative aide during the State of Alaska legislative session. She has also done work for the Alaska Municipal Conference which is the Alaska largest municipal group that address issues impacting Alaska communities statewide.

I would give Dianne Blumer my highest recommendation; her professionalism, knowledgeable, and many years of experience in the workings of state and municipal government make her an outstanding candidate for a position in your organization. If you need addition information, please do not hesitate to contact me either by phone or by e-mail my contact information is listed below.

Sincerely,

Frank Kelty  
E-Mail: [fvkelty@gmail.com](mailto:fvkelty@gmail.com)  
Phone: Cell 907-268-8718  
Phone: Home 760-565-1642

STATE CAPITOL  
PO Box 110001  
Juneau, Alaska 99811-0001  
907-465-3500  
fax: 907-465-3532



Governor Sean Parnell  
STATE OF ALASKA

550 West 7th Avenue #1700  
Anchorage, Alaska 99501  
907-269-7450  
fax: 907-269-7463  
www.gov.alaska.gov  
Governor@alaska.gov

November 25, 2014

To Whom It May Concern,

I am pleased to offer my recommendation on behalf of Commissioner Dianne Blumer, who has served in my Administration as chief executive of the Department of Labor and Workforce Development. She has filled a critical role in the operation of State government, giving direction to the agency, managing with a high level of expertise, and ensuring that the department answers to Alaskans in fulfilling its responsibilities under statute.

After she served as a Special Assistant in my office, I chose Dianne to serve as a Commissioner in my Administration because of her demonstrated integrity, professionalism, and competence. Throughout her time at the helm of the department, Dianne's commitment to serving the needs of Alaskans has been clearly evident. She has worked tirelessly to protect the interests of our state and her people, and has handled the demands of working in the highest levels of state government with grace and professionalism. Her leadership in the agency has been exemplary and has enabled our Administration to provide essential services and to accomplish much for Alaskans.

Commissioner Blumer has been a talented, valuable member of my Administration, and I am grateful for her years of service to Alaska in partnership with me. I am confident that Dianne has the expertise to provide solid leadership and take any organization to the next level, and I encourage your consideration of her as a qualified candidate for a position commensurate with her many accomplishments.

Best regards,

A handwritten signature in cursive script that reads "Sean Parnell".

Sean Parnell  
Governor

RFP Scoring & Evaluation – Lobbyist Services

Blumer & Associates

	Score	Notes:
Completeness of proposal (as per Proposal Format & Guidelines) – 10 points	<b>/10</b>	
Respondent's experience (past performance, work products, timeliness) – 25 points	<b>/25</b>	
References – 10 points	<b>/10</b>	
Fee Schedule/budget proposal – 25 points	<b>/25</b>	
Strategy for accomplishing goals and priorities for the District – 30 points	<b>/30</b>	
<b>TOTAL:</b>	<b>/100</b>	

**PROPOSAL FOR  
NORTHWEST ARCTIC SCHOOL DISTRICT AND BOARD  
LOBBYING SERVICES  
Legislative Session 2022**

**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  
November 1, 2021**

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 five 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. 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

### **Consultants Experience and Accomplishments:**

Christine Hess is an attorney with extensive experience in state and local government, having held the positions of Assistant Borough Attorney for the North Slope Borough and General Counsel and Government Affairs Director for the Northwest Arctic Borough. Additionally, Christine has held various finance positions, including Deputy Director of Finance, for the North Slope Borough. These positions have given Christine a firm grasp of municipal finance and governance. Reggie Joule served eight terms in the Alaska legislature representing District 40, and one term as mayor of the Northwest Arctic Borough.

Christine and Reggie began working together in the legislature when Christine became Reggie's chief of staff in 2000. For the next dozen years, the pair worked together lobbying for the interests of their constituents. For ten years, Reggie served as a member of the House Finance Committee, with oversight of all state budgets. Chris and Reggie became expert in the legislative process, and they developed a broad network of relationships in the legislature and the executive branch that they maintain today. Representing the District 40 region, Reggie and Christine were instrumental in bringing millions of dollars to the district, including funding for new schools, numerous capital projects, millions in funding for new heavy equipment, playground equipment, and upgrades and construction of community centers, power plants, and VPSO and teacher housing. During those years, Christine and Reggie worked on passing critical legislation that helped the region by addressing naturally-occurring asbestos problems, the 5-mile Dalton Highway Corridor, bingo gaming, and allowing local governments to administer the VPSO program, to name a few items. Oftentimes the pair worked to kill or amend legislation that was harmful to rural Alaska, including a controversial rewrite of education funding and the famous subsistence battles. Last, the partners were on the cutting edge of climate change and sponsored legislation that formed a climate change task force in 2006 and the Northern Waters Task Force in 2009, which eventually turned into the Arctic Policy Commission. As a state representative, Reggie actively and successfully advocated for his region for sixteen years with Christine's assistance.

After retiring from the legislature, Reggie was elected Mayor of the Northwest Arctic Borough, and Christine went to work as the Borough's lobbyist and legal counsel. From October 2012 to October 2015, Christine and Reggie undertook an extensive effort to actively lobby on behalf of the Borough. As a team, Reggie and Chris brought a flood of new funding to the Borough from a wide variety of public and private sources. During Reggie's administration, he and Christine procured millions of dollars for capital projects, including \$1.4 million over several years for new heavy equipment in various communities, the Shungnak and Noorvik Landfill cleanup, immersion school supply funding, playground equipment, upgrades and new construction for community centers, and VPSO and teacher housing. The administration worked with Alaska Native Tribal Health Consortium to obtain funding to upgrade power plants and create more efficient energy systems in several communities. Reggie and Chris also worked with the Alaska Energy Authority on renewable energy projects, including the construction of solar arrays on all village water tanks and more funding for wind energy projects in Buckland and Kotzebue.

Two aspects of Reggie's administration in the Borough are notable. First, Chris and Reggie expanded lobbying efforts to identify and target new funding sources. By developing relationships with state agencies, they were able to fund a number of projects with smaller funding sources that had been overlooked in the past. Examples include funding from the

Department of Public Safety for repairs to VPSO housing and to buy VPSO vehicles, a combination of grants from Conoco Philips and the state to fund efficient LED street lighting (including for Kotzebue), search and rescue equipment funded by the Rasmussen Foundation, safety equipment provided by the U.S. Coast Guard, and working with Maniilaq to secure a \$350,000 grant from the U.S. Department of Justice for public safety equipment. Many of these grants were small-scale opportunities that, taken together, represented significant benefits for Borough residents.

Second, Chris and Reggie energetically implemented the assembly's stated desire to expand the Borough's image and presence nationally and internationally. The Borough became a prominent participant in international discussions of Arctic issues, and it became a recognized presence in Washington D.C. The White House recruited Reggie to serve on President Obama's State, Local, and Tribal Leaders Task Force on Climate Change Preparedness and Resiliency, and the relationships Chris and Reggie developed culminated in the Borough's hosting of President Obama in Kotzebue. After Reggie's term as mayor, Reggie and Christine continued their work from the private sector by forming J&H Consulting.

If retained, joining us in our work for the NWABSD will be John Walsh as a subcontractor to J&H Consulting. J&H Consulting has been working closely with John for the last four years. In 1989, John accompanied the recently elected district Representative Richard Foster to Juneau and served as legislative staff. In 1991 John was invited by Commissioner Edgar Blatchford in Governor Hickel's administration as a Special Assistant to the Commissioner to focus squarely upon rural development. Projects accomplished while working in the executive branch included the Community Development Quota (CDQ) program, Rural Bulk Fuel Task Force which tied directly to the formation of the Denali Commission by Senator Stevens, funding for the Alaska Job Corps Center in Palmer, the Raven Commission findings and rural electrification projects. John returned to the legislative branch for an additional two years with Representative Foster, then Co-Chair of the House Finance Committee. Beginning in January 1997, John separated from state government and established his lobbying practice. 2021 marks the 24<sup>th</sup> year of professional lobbying. Education, rural economic development, local government and maritime/Arctic policy development are central to John's lobbying practice.

During the lean 2017 legislative session, J&H working with John Walsh was the only lobbying firm, to our knowledge, to successfully lobby for additional funding in both the capital and the operating budgets. J&H helped our clients obtain \$3.5 million for major maintenance funding that had been unfunded for years; \$7 million for the Kivalina school district; collaboration grants up to \$200,000 (SB 96); and \$1.2 million for pre-kindergarten education by continuing the *Moore* settlement funding for an additional year. J&H also worked with our education clients to ensure that \$2 million in state funded pre-elementary funding remained in the budget. Working behind the scenes, J&H quelled proposed reductions to education funding, to the debt reimbursement program, and to the REAA small-school construction fund. Additionally, J&H worked to restore partial funding for the Alaska Technical Center in Kotzebue. In 2017, Nome and Kotzebue were the only two technical centers to receive partially restored funding. J&H Consulting also worked to secure legislation that extended the sunset date for TVEP funding, allowed municipalities to give property tax credits, and ensured that the broadband internet grants were completely funded. Additionally, we blocked bills that were detrimental to our clients' interests. In the 2018 session the J&H team worked with our clients to accomplish the following:

- Base student allocation increases in 2019 and 2020 and advanced funding for education through the passage of HB 287, a NWABSD priority;
- Additional funding to increase the Department of Education's capacity to support schools and school districts;
- Preserved \$2 million in pre-elementary funding, reinstated full \$1.2 million in pre-elementary grants for *Moore* school districts, and won an additional \$6 million for pre-elementary over the next 2 years, a NWABSD priority;
- \$24 million for major maintenance;
- Passage of HB 212 allowing REAA school construction funds to be used for major maintenance;
- Passage of HB 135 which allows DEED flexibility in extending the time frame for school construction local match;
- Passage of HB 224 allowing the rehire of retired teachers, a NWABSD priority;
- Passage of HB 213, the Public-School Trust Fund bill, which increases funding to schools;
- Passage of HB 233 extending the education tax credit program, a NWABSD priority;
- Passage of SB 216, the school consolidation hold harmless bill;
- Community revenue sharing funded; and
- Blocked bills that were detrimental to our client's interest regarding broadband, craft distilleries and alcohol regulations.

In the 2019 and 2020 sessions, J&H worked on the following priorities for our clients:

- Full funding of the Base Student Allocation plus the \$20 million in one-time grant funds paid to schools (FY19) and \$30 million (FY20), a NWABSD priority;
- PCE endowment protected, a top priority of the NWABSD;
- Full funding of early education grants used to fund Pre-K programs and early-learning coordination, including Head Start programs in Alaska. The state funding is used as a match to obtain about \$46 million in federal funding, also a NWABSD priority;
- Full funding for Best Beginnings grants, Parents as Teachers program, Live Homework Help, and Online with Libraries.
- Reverse sweep occurred, restoring funding to 54 savings accounts including PCE, WWAMI, Alaska Performance Scholarship Funds, and broadband grants;
- Statewide deferred maintenance funded at \$10.7 million;
- Community revenue sharing funded;
- Assisted in blocking attempts by the administration to divert \$400 million in municipal tax dollars to state government. This was a top priority for clients Arctic Slope Regional Corporation and North Slope Borough;
- NPRA Impact Aid grants funded, a top priority for the North Slope Borough;
- Working with the administration and the Department of Law, added \$500,000 in funding for a new district attorney position in Utqiagvik, a top priority for ASRC and the NSB;
- Passage of SB 74, the internet broadband grant bill and HB 235 reauthorizing technical and vocational training, a NWABSD priority;
- Protected the sale of Municipality of Anchorage utility with amended language;
- \$2.8 million for Pioneer Homes and \$1.6 million for API for facility upgrades compliance;
- Behavioral Health Treatment and Recovery grants, \$12.8 million, and Prevention

and Early Intervention Grants, \$3.25 million and full funding Community Initiatives and Human Services Matching grants;

- \$2 million for AHFC Special Needs Housing plus \$2 million to restore SNUG funds vetoed in HB 206;
- Ensured our clients' interests were protected with federal CARES Act funding and the passage of HB 308 unemployment benefits which expanded benefits during the pandemic.

Fiscal year 2022 is the 11<sup>th</sup> straight year of fiscal deficits for the state. From 2013 to 2021, the state's undesignated general fund budget has been reduced 43%. The Labor and Workforce Department has seen reductions of 47.9%, Transportation 55.4%, and Commerce 84.3%. Due to a focused lobbying effort education has only seen a reduction of 2.3%. In the 2021 session, 37 bills passed, a number believed to be the lowest on record. Many of those bills merely extended the life of a program or named a bridge or road. Against this backdrop J&H worked to accomplish the following during the session and special sessions:

- Full funding of the Base Student Allocation, a top priority of the NWABSD;
- PCE endowment protected, a top priority of the NWABSD;
- Full funding of early education grants used to fund Pre-K programs and early-learning coordination, including Head Start programs in Alaska. The state funding is used as a match to obtain about \$46 million in federal funding.
- Full funding for Best Beginnings grants, Parents as Teachers program, Live Homework Help, Broadband grants, and Online with Libraries;
- Funding of the WWAMI, Alaska Performance Scholarship Funds, and Alaska needs grants;
- Funding of KEA's renewable energy battery project \$325,000;
- TVEP sunset and funding bill passed;
- Ensured our clients' interests were protected with federal CARES Act funding;
- Partial funding of community revenue sharing and the harbor grant program;
- Ensured client meetings with representatives despite the closure of the state capitol to the public.

While credit for success must always be shared among the array of players involved, J&H and John Walsh were instrumental in furthering our clients' goals over the last six years. During these years, most of our clients' top priorities were accomplished, including restoring and adding funding for our clients during times when the state's budgets were being significantly cut. Notably, as detailed above, Reggie and Christine, in a variety of roles, have been advocating for rural Alaska and the Northwest Arctic region for many years.

### **Strategy for Accomplishing Goals and District Priorities:**

As outlined above, the State of Alaska has been grappling with a fiscal crisis for ten years with little progress toward solving it. Capital budgets have been limited to mostly federal projects that just require a state match. The savings accounts that were used to close the fiscal gaps in prior years are all but drained, leaving Alaska with few positive options. Moving forward there are few places left to cut except education and health and social services but the state is still faced with looming budget deficits estimated between \$700 million to \$1.2 billion. It is likely that education reductions and a possible reworking of the Base Student Allocation and TVEP funding may be proposed in the next couple of years. The

work of the NWABSD, board members and partners has helped keep education funding whole but strong advocacy efforts will need to continue, especially over the next several years until a solid fiscal plan is enacted. Additionally, understanding where the state is fiscally is important in planning any legislative strategy and in setting goals.

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. This year, with the continuing reality of COVID19, adjustments may need to be made in communicating with legislators and may require meetings by Zoom or teleconference. This legislative session may continue to be challenging; J&H Consulting's flexible, nimble and creative approach to lobbying is made for this moment. J&H Consulting is already considering these factors and we are in contact with legislative leadership about plans for the 2022 session. 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.

At some point during session, J&H Consulting will also set up teleconference meetings with Alaska's Congressional Delegation or plan a scheduled trip to Washington, D.C. to meet up with the delegation in person and possibly the Department of Education or other appropriate federal agencies. If certain federal legislation passes, an in-person meeting could be very advantageous.

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:**

Over the last few years, capital budgets 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.

**Previous and Current Clients:**

- Northwest Arctic Borough School District, Alaska Technical Center, Star of the North Magnet School;
- Coalition for Education Equity (a consortium of 13 rural school districts and the Anchorage School District);
- North Slope Borough, an organized local government;
- City of Homer, an organized local government;
- Alaska Municipal League, jointly represents all of its member municipalities and cities around the state;
- Kotzebue Electric Association, an electric utility cooperative;
- Spickett's Palace LLC, a Juneau real estate business;
- Trust Consultants, a lobbying firm serving the Municipality of Anchorage.
- Dave Heier Trusts, multi-state real estate and trust businesses;
- Municipality of Anchorage (Contract ended September 15<sup>th</sup> with change in administration).

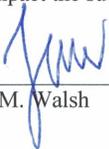
**Conflict of Interest:**

J&H Consulting is aware of no conflicts that would prevent us from fully representing the Northwest Arctic Borough School District.

**J.M. Walsh Company, Inc.**  
2021 Legislative Lobbying Client List

Alaska Council of Engineering Companies (ACEC)  
Alaska Professional Design Council (APDC)  
Alaska Psychologists Association (AKPA)  
Bering Strait School District (BSSD)  
Bristol Bay Borough (BBB)  
Bristol Bay Economic Development Corporation (BBEDC)  
Lower Yukon School District (LYSD)  
Northwest Arctic Borough School District (NWABSD)  
Municipality of Skagway (MOS)  
Yukon Delta Fisheries Development Association (YDFDA)

The above list represents registered lobbying clients for calendar year 2021. I have represented all three of the listed school districts for a period of time and have not had any conflicts, conflicts of interest – real or perceived. I would not expect continued contract relations with the NWABSD going forward would pose any conflict that would impact the successful implementation of stated goals and priorities of the District.

  
\_\_\_\_\_  
J.M. Walsh

J.M. Walsh Company, Inc.  
907.586.9059

**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. 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. Many of our combined years of advocacy have been focused on the Northwest Arctic region. Resumes and letters of recommendation are included as part of the bid proposal. 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 and Reggie Joule*

Christine Hess and Reggie Joule  
J&H Consulting

Reggie Joule  
P.O. Box 673  
Kotzebue, Alaska 99752 (907)  
350-5057

Partner J and H Consulting  
September 2016 to present  
Juneau and Kotzebue, Alaska

- Provide consulting and lobbying services on the state and federal level.
- Provide consulting services on Arctic, municipal and administrative governance issues.
- Assist in establishing, maintaining, and further developing successful working relationships with members of the legislature, legislative leadership in both the minority and majority caucuses, state agencies and the administration.
- Assist clients in setting goals and priorities.
- Assist in getting legislation drafted, introduced and passed into law.
- Provide legislative strategy and advice.
- Assist in written communications and research.
- Monitor and review existing and proposed legislation, state policies, and programs.
- Provide written and oral updates of the legislative session.

**ELECTED  
OFFICES:**

Mayor, Northwest Arctic Borough  
October 2012 - October 2015  
Kotzebue, Alaska

- Daily management of three departments with up to 40 staff members.
- Oversight of a \$47 million budget.
- Represented the Borough's interests at state, federal, and international levels.
- Served as co-chair of the Northwest Arctic Leadership Team.
- Successfully lobbied state and federal governments on behalf of Borough.
- Obtained over \$25 million in grant funding from state, federal, corporate and nonprofit entities.
- Procured new financial services for the Borough, resulting in a doubling of investment returns.
- Led in the establishment of a research program and secured a five-year, multi-million dollar grant from Shell Oil to develop a science research program.
- Revised the Borough code to streamline government operations.
- Oversight of preparations for taxation negotiations with owners of Red Dog Mine; interviewed and hired experts and professionals in a variety of related fields.
- Coordinated official visits to region: U.S. President, U.S. Secretary of Interior, U.S. Coast Guard, and various other federal and state officials. Hosted business representatives and members of media.
- Attended and actively participated in national and international Arctic events.
- Represented the Borough at speaking engagements at state, federal and international forums.
- Delegate to Inuit Circumpolar Council General Assembly in Paris.
- Delegate to Inuit Circumpolar Council General Assembly conference in Inuvik, Northwest Territories.

- Served on Governor Walker's Arctic Policy transition team.
- Participant in Governor Walker's budget conversations: Building a Sustainable Future.
- Strategically worked with the North Slope Borough through the Arctic Economic Development group.
- Addressed Borough concerns and emergencies as needed.

State Representative, House District 40  
 Alaska State Legislature  
 January 1997 - October 2012  
 Kotzebue, Alaska

- Represented the Northwest Arctic and North Slope areas, a district containing most of the American Arctic and the major industrial areas of Prudhoe Bay and the Red Dog Mine. Hired and managed staff, resolved constituent problems and issues with government, and successfully carried legislation to passage.
- Chair of the Alaska House Bush Caucus, coordinating the political interests of Alaska's rural house districts, 2007-2012.
- House Minority Whip, 2001-2002.
- Served as a coalition member with the Majority Caucus, 2008-2012.
- Secured millions of dollars in funding for House District 40.

#### COMMITTEE MEMBERSHIPS:

- House Finance: Oversight and review of the multi-billion dollar State of Alaska operating and capital budgets and all legislation with a fiscal impact, 2003-2012.
- Chair, Department of Health & Social Services Finance Subcommittee: Oversight and review of the multi-billion dollar State of Alaska Health and Social Services budgets, 2008-2012.
- Chair, Department of Environmental Conservation Finance Subcommittee: Oversight and review of the multi-million dollar State of Alaska Environmental Conservation budgets, 2008-2012.
- University of Alaska Finance Subcommittee: Oversight and review of the multi-billion dollar State of Alaska University budgets, 2008-2012.
- Legislative Budget and Audit, 2001-2008.
- Health, Education and Social Services, 2001-2002.
- Education, 2001-2002.
- Oil and Gas, 2001-2002.
- Natural Gas Pipeline, 2001-2002.
- Rules, 1999-2002.
- Committee on Committees, 1999-2002.
- Resources, 1997-1999.
- Community and Regional Affairs, 1997-1999.
- Special Committee on International Development, Trade & Tourism, 1997-1998.
- Special Committee on World Trade, State and Federal Relations, 1999-2000.
- Special Committee on Economic Development, Trade & Tourism, 2009-2012.
- Joint Committee on Education Funding District Cost Factor, 2009-2010.
- Joint Armed Services, 1999-2003.
- Conference Committees: SB 283, (2003); SB 232, (2005); HB 365 and 366, (2005); HB 310 and 312, (2008); HB 95 and 96, (2009); SB 59, (2009).

## APPOINTMENTS:

### Alaska Arctic Council Host Committee

August 2015 - Present

- Assisting in coordinating Arctic events in Alaska and public relations during the U.S. Chairmanship of the Arctic Council
- Co-chair of Public Relations Subcommittee

### Municipal Advisory Gas Project Review Board

March 2014 - Present

- Examining the development of a framework to evaluate the effects and issues concerning development of the State's natural gas resources

### President Obama's State, Local, and Tribal Leaders Task Force on Climate Change Preparedness and Resiliency.

November 2013 - November 2014

- As one of two tribal leaders, represented the interests of all indigenous people in the United States.
- Contributed to the publication of the **PRESIDENT'S STATE, LOCAL, AND TRIBAL LEADERS TASK FORCE ON CLIMATE PREPAREDNESS AND RESILIENCE: RECOMMENDATIONS TO THE PRESIDENT**, November 2014.

### Alaskan Arctic Policy Commission

January 2013 - January 2015

- Contributed to the **FINAL REPORT OF THE ALASKA ARCTIC POLICY COMMISSION**, January 2015, establishing an Arctic Policy for the State of Alaska.

### Alaska Northern Waters Task Force, Chair

January 2009 - January 2012

- Task force commissioned by Alaska legislature to examine the changing Arctic and make policy recommendations.
- Contributed to the publication of the **FINDINGS AND RECOMMENDATIONS OF THE ALASKA NORTHERN WATERS TASK FORCE**, January 2012.

### Alaska Climate Impact Assessment Commission, Vice-chair

January 2007 - January 2008

- Examined the changing climate in Alaska
- Contributed to the publication of the Alaska Climate Impact Assessment Commission's Final Report and Recommendations.

### School District Costs Task Force

January 2005 - January 2006

- Examined and analyzed current data on school district costs around the state.
- Sought solutions to equalize the varying costs of school districts across the state.
- Made recommendations on school district costs.

Legislative Education Funding Task Force  
January 2007 - 2008

- Examined and made recommendations on school funding

#### PAST MEMBERSHIPS:

Institute of the North (Current)  
Chairman, Governor's Advisory Board on Alcoholism and Drug Abuse  
Vice-Chair, Governor's Interim Commission on Children and Youth  
Vice-Chair, Alaska Association of School Boards  
Alaska Human Resource Investment Council  
NANA Regional Corporation Board  
Kotzebue City Council  
Northwest Arctic Borough School Board  
Kotzebue Dog Musers Association  
Bundle Carrier for the Sobriety Movement  
World Eskimo Indian Olympics  
Alaska Sports Hall of Fame

#### PAST PRESENTATIONS:

COMMENTS ON NATIVE ALASKANS AND THE CHANGING ENVIRONMENT, Conference on Global Leadership in the Arctic: Cooperation, Innovation, Engagement and Resilience (GLACIER), Anchorage, Alaska, August 31, 2015.

A SHARED AND SECURE ARCTIC ENVIRONMENT, Arctic Collaborative Workshop, Fairbanks, Alaska, April 15 - 17, 2014.

OVERVIEW OF THE PRESIDENT'S TASK FORCE ON CLIMATE CHANGE PREPAREDNESS AND RESILIENCY AND THE IMPACTS OF A CHANGING CLIMATE IN ALASKA, Alaska Federation of Natives, Anchorage, Alaska, February 3, 2014.

CLIMATE CHANGE, THE ARCTIC, AND THE INTERSECTION WITH ALASKA'S INDIGENOUS PEOPLE, Arctic Encounters Symposium, Seattle, Washington, February 8, 2014.

RURAL ENERGY IN ALASKA, Arctic Energy Summit, October 8-10, 2013, Akureyri, Iceland.

THE AMERICAN ARCTIC, NATIVE CULTURES AND A CHANGING ARCTIC; Arctic Circle Forum, October 12, 2013, Reykjavik, Iceland.

NATIVE CULTURES FACING THE IMPACTS AND CHALLENGES OF A CHANGING CLIMATE, International Polar Foundation Arctic Futures Symposium, October 16 - 17, 2013 Brussels, Belgium.

SUMMARY OF THE MAIN FINDINGS OF THE ALASKA NORTHERN WATERS TASK FORCE, Invited Testimony to U.S. Congress, Committee on Natural Resources, April 3, 2012, Washington, D.C.

Christine L. Hess  
P.O. Box 23293  
Juneau, Alaska 99802  
(907) 957-2276

EXPERIENCE: Partner, J and H Consulting  
September 2016 to present  
Juneau, Alaska

- Provide consulting and lobbying services on the state and federal level.
- Provide consulting services on Arctic, municipal and administrative governance issues.
- Assist in establishing, maintaining, and further developing successful working relationships with members of the legislature, legislative leadership in both the minority and majority caucuses, state agencies and the administration.
- Assist clients in setting goals and priorities.
- Assist in getting legislation drafted, introduced and passed into law.
- Provide legislative strategy and advice.
- Assist in written communications and research.
- Monitor and review existing and proposed legislation, state policies, and programs.
- Provide written and oral updates on the legislative session.

Personal Investing  
1995 to present

- Buying, selling, rehabilitating, renting, constructing, and managing residential and commercial real estate in Alaska and Washington, with an emphasis on historic properties.
- Part owner of an electrical contracting company, a restaurant, a mall, a historic multi-use building in Juneau, large apartment complexes in Anchorage and Juneau, and other rental properties in Alaska and Washington.
- Own and manage 18,000 square feet of retail and a boutique hotel in downtown Juneau.
- Own and manage a 23-unit apartment complex in Juneau.

Government Affairs Director and General Counsel  
Acting Science Department Co-Director (February 2013 -March 2014, November 2015 - May 2016)  
Northwest Arctic Borough  
January 2012 to May 2016  
Juneau and Kotzebue, Alaska

- Advising Northwest Arctic Borough Mayor on legal and government-related matters, including policy issues.
- Coordinating preparations for taxation negotiations with owners of Red Dog Mine; interviewing and hiring professionals and experts in a variety of related fields; updating mining and tax

ordinances; reviewing economic analysis of mining tax structures; strategic planning regarding negotiations.

- Lobbying state and federal governments on behalf of Borough.
- Staff for all Arctic policy matters affecting the Northwest Arctic Borough's interest at state, federal, and international levels. Attending and actively participating in Arctic events; monitor the Arctic Policy Commission, International Maritime Organization/Polar Code, Harbor Safety Commission, United States Arctic Research Commission, Institute of the North, Inuit Circumpolar Conference, Arctic Council, and other entities.
- Lead staff for Mayor Joule's service on President Obama's National Task Force on Climate Change Preparedness and Resiliency, Alaska Arctic Policy Commission and the Governance Coordinating Committee for the National Ocean Council.
- Lead staff in obtaining over \$25 million in grant funding from state, federal, corporate and nonprofit entities.
- Assisted in coordination of Presidential visit and other high level federal officials to the region.
- Spearheaded review and procurement of financial services for the Borough, resulting in a doubling of investment returns.
- Lead staff in obtaining a five-year, multi-million dollar grant from Shell Oil to develop a science research program; helped implement the program as acting science co-director.
- Managing and implementing special projects as assigned by the Mayor.
- Assisted in revision of the Borough code to streamline government operations.
- Monitoring state and federal legislation, capital, and operating budgets.
- Drafting speeches, opinion pieces, constituent newsletters, and organize other communications with constituents.
- Directing constituent relations, resolving constituent problems.

#### Chief of Staff

Office of Representative Reggie Joule, Alaska State Legislature

January 2000 to January 2012

Juneau, Alaska

- Chief of Staff to Representative Reggie Joule of House District 40, a district containing both Prudhoe Bay and the Red Dog silver and zinc mine.
- Supervising staff of up to five.
- Lead staff to the Alaska House Bush Caucus, coordinating the political interests of Alaska's rural house districts.
- Lead staff to the Alaska Northern Waters Task Force, a 13-member task force examining Arctic conditions and making recommendations for Alaskan Arctic Policy. Drafted and edited the final recommendations of the task force.
- Lead staff for the Education Task Force and District Cost Factor Joint Committee.
- Lead staff for House Finance, Health and Social Services, Education, Resources, Community and Regional Affairs, Legislative Budget and Audit, Oil and Gas and Natural Gas Pipeline Committees.
- Assisted in obtaining millions of dollars for House District 40.
- Draft, carry, and monitor legislation.
- Monitor capital and operating budgets.

- Draft speeches, opinion pieces, constituent newsletters, and organize other communications with constituents.
- Direct constituent relations, resolve constituent problems.

#### Deputy Director

North Slope Borough Department of Administration and Finance

May 1999 to November 1999

Barrow, Alaska

- Managed and implemented special projects as assigned by the Director of Administration and Finance. Major projects included reorganization of the Risk Management Division, resolution of a major insurance compliance issue, the consolidation of borough divisions, and the analysis and implementation of benefit changes.
- Procured coverage and coordinated all insurance matters for the North Slope Borough.
- Managed and supervised five divisions and approximately 50 employees.
- Reorganized and consolidated five divisions and services provided within the department.
- Assisted in reducing the budget by \$6 million without any employee lay-offs.

#### Special Assistant

North Slope Borough Department of Administration and Finance

January 1998 to April 1999

Barrow, Alaska

- Managed and implemented special projects as assigned by the Director of Administration and Finance. Major projects included reorganization of the Risk Management Division, resolution of a major insurance compliance issue, the consolidation of borough divisions, and the analysis and implementation of benefit changes.
- Procured coverage and coordinated all insurance matters for the North Slope Borough.
- Assisted in reducing the budget by \$6 million without any employee lay-offs.
- Served as Acting Deputy Director of Administration from January 1998 thru April 1999; management of five borough divisions and approximately 50 employees.

#### Guardian Ad Litem and Court Visitor

September 1994 to October 1999

Barrow, Alaska

- Served as guardian ad litem and court visitor for indigent clients, elders, and children by appointment of the Superior Court.
- Investigated, wrote court reports and made recommendations to the presiding judge.

#### Assistant Borough Attorney

North Slope Borough

June 1994 to January 1998

Barrow, Alaska

- Provided general legal advice to the Departments of Housing, Capital Improvements, Energy Management, and Search and Rescue.
- Provided final legal review of all contracts, leases, grants and purchases for the North Slope Borough, including legal oversight of the \$350 million dollar area-wide village water and sewer program.
- Revised, updated, and streamlined the procurement regulations and all NSB standard form contracts.
- Supervised department during service as Acting Director.

Staff Attorney  
Alaska Legal Services Corporation  
March 1992 to June 1994  
Anchorage, Alaska

- Provided legal assistance to indigent clients in civil cases.
- Represented clients in domestic relations, housing, Native and elder law.
- Managed all aspects of caseload from client intake through trial.
- Supervised up to four paralegals and interns.
- Supervised Anchorage area wide office during occasional service as Acting Supervisor.

Associate Attorney  
Jermain, Dunnagan & Owens, P.C.  
March 1990 to March 1992  
Anchorage, Alaska

- Practiced in the areas of education, constitutional and domestic relations law.
- Provided major litigation support to the senior attorney, including drafting motions, pleadings, trial briefs, and conducting discovery.
- Supervised one paralegal and one secretary.

Supreme Court Clerk  
Justice Edward Burke, Alaska Supreme Court  
August 1988 to September 1989  
Anchorage, Alaska

- Drafted Supreme Court opinions, wrote pre-conference and pre-oral memoranda, studied case files, researched legal issues and made recommendations to Justice Burke and the Alaska Supreme Court.

Assistant Director and Academic Tutor  
University of Puget Sound School of Law (now Seattle University)  
September 1985 to August 1988  
Tacoma, Washington

- Wrote study guides for civil procedure and torts.
- Tutored and counseled targeted students in torts, criminal law, and civil procedure.
- Reinforced basic knowledge and taught exam, writing, and legal analysis skills.

- Supervised and trained groups of tutors for first year law school courses.

**EDUCATION:** University of Puget Sound School of Law  
Juris Doctor, cum laude  
December 1987

- Dean's List: 1984-1985, 1985-1986, 1986-1987
- Law School Achievement Scholarship: 1986-1987

Portland State University  
B.S., Psychology  
June 1984

**MEMBERSHIP:** Alaska and Juneau Bar Associations

**COMMITTEES:** National Petroleum Council's subcommittee on the Arctic Human Environment,  
November 2014 to March 2015

- Contributed to the publication *Arctic Potential: Realizing the Promise of the U.S. Arctic Oil and Gas Resources*.

North Slope Borough Budget Committee

December 1995 to February 1996; December 1996 to February 1997; December 1998 to February 1999

- Prioritize and fund budget allocations for all North Slope Borough departments. Approx. total budgets: \$170 mil.

Alaska Legal Services Board of Directors, Second Judicial District, Alternate Seat 1994 to 1996

- Prioritize budget allocations for the provision of statewide legal services to the poor and prioritize client service base.

**Co-DRAFTER:** FINDINGS AND RECOMMENDATIONS OF THE ALASKA NORTHERN WATERS TASK FORCE,  
January, 2012.

**CO-PUBLICATIONS:** WHAT PROCESS IS DUE? UNACCOMPANIED MINORS' RIGHTS TO DEPORTATION HEARINGS  
Duke Law Journal, Vol. 1 February 1998, pgs. 114-128.

**RECENT PRESENTATIONS:** INTEGRATING WESTERN SCIENCE AND TRADITIONAL KNOWLEDGE IN THE  
NORTHWEST ARCTIC BOROUGH, 8<sup>th</sup> Annual Polar Law Symposium, Anchorage, Alaska  
September 26, 2015.

SUSTAINABLE SOCIAL IMPACT MITIGATION AND MANAGEMENT IN THE NORTHWEST ARCTIC  
BOROUGH, U.S. Department of State, Office of Ocean and Polar Affairs, Forum on Oil and Gas  
Sector Regulation and Long-Term Management in the Arctic, Reykjavik, Iceland August 18, 2015.

P.O. Box 240952  
Douglas, Alaska 99824  
Work Phone (907) 586-9059  
Cell Phone (907) 321-0983  
Email jmwalshco@gci.net

## John M. Walsh

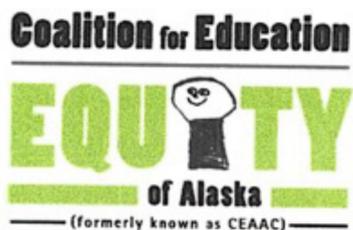
### Objective

Professional Lobbying/Business Consulting - Contractual

### Experience

- 1997 - Present                      Lobbyist - Private Practice                      Juneau, AK
- 1995 - 1996                      Alaska State Legislature                      Juneau, AK  
Representative Richard Foster
- 1991 - 1995                      State of Alaska                      Juneau, AK  
Commissioner Edgar Blatchford, Community & Regional Affairs
- Special Assistant to the Commissioner (1993 - 1995)
  - Deputy Director, Rural Development Division (1991 - 1993)
  - Staff assigned to the Community Development Quota (CDQ) Fisheries Program
  - Develop Policy Issues for the Commissioner on Rural Development Projects, including Rural Bulk Fuel Task Force
  - Administer 5 Programs; 40+ Staff; Manage and Defend Budgets
- 1989 - 1991                      Alaska State Legislature                      Juneau, AK  
Representative Richard Foster
- 1975 - 1991  
Commercial Fishing, Construction, Accounting
- Commercial King/Tanner Crabbing in the Bering Sea (1979-1982)
  - Commercial Salmon Fishing & Vessel Owner Bristol Bay (1980-1991)
  - Commercial Herring Fishing & Vessel Owner Norton Sound (1979-1991)
  - Heavy Equipment Operator - Airports, Pipeline, Road Construction
  - Income Tax and Auditing - Milton Johnson, CPA
- 1974 - 1978                      Santa Clara University                      Santa Clara, CA
- B.S. Commerce (Accounting)
- 1974                      Monroe High School                      Fairbanks, AK
- High School Diploma (Scientific)

### Education



October 15, 2021

To whom it may concern:

My name is Sarah Sledge and I am the Executive Director for the Coalition for Education Equity Education (CEE), a statewide organization representing Alaska school districts, organizations, and individuals to champion a quality, equitable, and adequate public education for every Alaska child. Founded as the Citizens for the Educational Advancement of Alaska's Children (CEAAC) in 1996, our organization fought and successfully settled both the Kasayulie and Moore lawsuits. These landmark court cases continue to guide our work today, and are the foundation for our organization's priority areas, which we advance through policy development, advocacy, and legal activity.

We work with Reggie Joule and Christine Hess of J&H Consulting, a lobbying firm, to advocate for and advance CEE's priorities. CEE hired J&H Consulting in 2017 and have worked with them every year since, utilizing their extensive legislative experience and lobbying expertise. I have accompanied Chris and Reggie to many meetings with legislators over the last four years. Their reputation and relationships with legislators and legislative staff make them welcome in every legislator's office, and they regularly meet with legislators of all political persuasions. Chris and Reggie have a reputation for working across party lines to accomplish their clients' goals and there is an eagerness in the capitol to work with them both. They have helped CEE move our priorities and continue to keep our priorities top of mind for legislators.

Over the last several years while other state departments have received budget reductions, the Department of Education has only seen small reductions despite many attempts to cut the education budget more significantly. Additionally, all of CEE's priority legislation has passed. I believe the strong advocacy of J&H Consulting working with CEE played a critical role in achieving these goals. Some of our other major accomplishments are listed below.

- Maintained consistent baseline funding for education despite efforts to reduce funding;
- Additional funding to increase the Department of Education's capacity to support schools and school districts;
- Base student allocation increases in 2019 and 2020 and advanced funding for education through the passage of HB 287;
- Preserved \$2 million in pre-elementary funding, reinstated full \$1.2 million in pre-elementary grants for *Moore* school districts, and won an additional \$6 million for pre-elementary;
- \$27 million for major maintenance;
- Passage of HB 212 allowing REAA school construction funds to be used for major maintenance;

#### Board of Directors

Scott MacManus  
President

Jamie Burgess  
Vice President

Kimberly Hankins  
Secretary

Mike Hanley  
Treasurer

Glenn Bafia  
Executive Board Member

Deena Bishop  
Executive Board Member

Sarah Sledge  
Executive Director

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Alaska Gateway School District  
Anchorage School District  
Bristol Bay Borough School District  
Chugach School District  
Iditarod School District  
Kake City School District  
Kuspuk School District  
Lower Kuskokwim School District  
Lower Yukon School District  
Nenana City School District  
Nome Public Schools  
Northwest Arctic Borough School District  
Saint Mary's City School District  
Yukon Flats School District  
Yukon-Koyukuk School District  
NEA-Alaska

#### Education Partners

Alaska Council of School Administrators

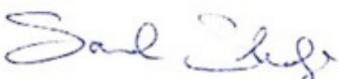
Association of Alaska School Boards

- Passage of HB 135 which allows DEED flexibility in extending the time frame for school construction local match;
- Passage of HB 224 allowing the rehire of retired teachers;
- Passage of HB 213, the Public School Trust Fund bill, which increases funding to schools;
- Passage of HB 233 extending the education tax credit program;
- Passage of SB 216, the school consolidation hold harmless bill;
- Passage of sunset bills for TVEP and SESA

CEE reports to a board of directors representing our members from across the Alaska, including 14 school districts, many of which are located in remote parts of the state. Working with me, Reggie and Chris keep our board apprised about what is happening during the legislative session, how our priorities are progressing, and how our objectives are being met. Both work well with a wide variety of people and personalities and both can explain complex budget maneuvers and strategies in simple terms. J & H Consulting provides frequent and timely information before and during the legislative session and alerts me whenever there is an important matter that must be addressed. They provide insightful strategic advice which is used to implement and revise our strategy as needed throughout the legislative session.

I highly recommend J & H Consulting. Reggie and Chris are a pleasure to work with, are excellent communicators, and critical strategic partners in our legislative and administrative advocacy. Please feel free to contact me if you have any questions or would like additional information.

Best regards,



Sarah Sledge  
Executive Director

October 10, 2021

To whom it may concern,

I am the former Chief of Staff for the Municipality of Anchorage (MOA). J & H Consulting represented the MOA for several years. I managed the legislative lobbying team for the MOA, which consisted of either two or three sets of lobbyists. I could count on Reggie and Chris to provide the legislative assistance that was required for the MOA, the largest community in the state with a \$557 million-dollar budget, to advance its legislative priorities and goals.

J & H Consulting provided updates both in writing and by teleconference on a regular basis, both during the legislative session and during the interim. These updates help inform and provide strategic direction for the MOA. Reggie and Chris were able to provide insights that helped the MOA adapt their strategies to maximize the benefits to the MOA. On more than one occasion, Reggie and Chris helped mend relationships or smooth over differences. They also worked well with the MOA's other lobbyists and coordinated efforts and communication between the groups to maximize the benefits to the MOA.

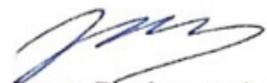
The MOA's priorities each legislative session tended to be few, but they were large and often a heavy lift. The MOA's top priority was the multi-million-dollar port expansion project. Reggie and Chris helped raise awareness about the current state of the project and assisted in alleviating the negative perceptions surrounding the project. Some of the other priorities accomplished included Reggie and Chris assisting in securing an additional \$7 million in funding for the MOA's COVID response and the restoration of community assistance funding. Reggie and Chris also worked to get language added that protected the sale of the MOA's electric utility. This was extremely important legislation that allowed the almost one billion-dollar sale of the utility to advance unhindered. In the waning hours of session it became apparent that an amendment was needed to protect the sale of the utility. With the clock ticking, Reggie and Chris worked with the lobbying team to successfully coordinate the effort to get the needed language added. The problem arose and was solved within the last 48 hours of the 2019 session. In past years, Reggie and Chris have also assisted in getting priority legislation passed or amending other legislation.

Additionally, Reggie and Chris monitored and ensured funding levels for targeted items including the Alaska Psychiatric Institute base funding and capital projects, Pioneer Homes, AHFC Housing Programs, and Behavioral Health, Intervention, and Community Initiatives and Human Services Matching Grants. Last year, in the last weeks of session, Reggie and Chris worked to get millions of dollars in construction projects reappropriated to the MOA for construction and park projects around the city. This required Chris and Reggie to work with well over ten different offices and with both Republicans and Democrats. During the pandemic, Reggie and Chris worked to ensure that the MOA's interests were protected with federal CARES Act funding and the passage of HB 308 which expanded unemployment benefits. Despite the pandemic and the capitol being closed to the public, the MOA met with many legislators about the MOA's priorities. Reggie and Chris are well known in the building and are well received in all offices.

Reggie and Chris are known for working across party lines to get the job done and during these contentious political times this asset helps in getting priorities accomplished. They have a network that crosses party lines which is a rare find these days. Chris and Reggie are easy to work with, listen and communicate well, provide solid advice, and worked hard to accomplish MOA's priorities.

J & H was always ready to assist and to go above and beyond to meet the MOA's legislative needs. I would be happy to answer any questions you may have regarding J & H Consulting.

Best regards,



Jason Bockenstedt

Former Chief of Staff, Municipality of Anchorage

October 2, 2021

To whom it may concern,

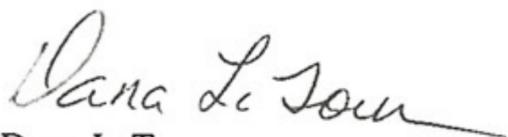
I am employed by Dominion Voting, a US corporation based in Denver, that is primarily focused on providing ballot tabulation systems. I hired J & H Consulting to assist me with outreach with the Alaska State Legislature and Governor Dunleavy's Administration to increase awareness about our company, its history, goals, and objectives. I highly recommend hiring J & H Consulting for both your legislative and administrative needs.

Reggie and Chris arranged meetings with a variety of legislators including members of leadership to introduce them to our company and its work. They also arranged several meetings with Lieutenant Governor Meyer. We were warmly welcomed in all offices, and you could see that office staff and legislators alike were genuinely happy to see Reggie and Chris and were eager to work with and assist them. Additionally, J&H worked with the current administration and the Lt. Governor's office on an election equipment procurement process. Amid bid complexities, J&H worked with the Lt. Governor's office to clarify the bidding process on behalf of Dominion Voting. J & H quickly responded when the procurement issues arose, performed outreach with administration officials, and provided critical and strategic analysis in writing within hours. Resolving the issue required much outreach and work with the Lt. Governor's office and his Chief of Staff. The problem was resolved by early the next day.

J&H Consulting also tracked and researched election funding and bills on our behalf and informed us on a regular and timely basis about these items, whether changes were happening, and if we needed to respond. We were very happy with J & H Consulting's work performance on our behalf.

At your convenience, I would be happy to discuss our experience with J & H.

Best regards,



Dana LaTour  
775-223-7230  
Dominion Voting



## LOWER YUKON SCHOOL DISTRICT

P.O. Box 32089 • Mountain Village, Alaska 99632

Phone: (907) 591-2411

[www.lysd.org](http://www.lysd.org)

**George Smith**  
Chairman

**Gene Stone**  
Chief School Administrator

October 25, 2021

To Whom it May Concern:

John Walsh has effectively represented and advocated for the Lower Yukon School District during the 5 years I have worked with him in the Lower Yukon School District. John offers great value as some of the work he has done has been instrumental in opening doors to the highest level of government.

We have yielded legislative actions that have resulted in the opening of a highly successful CTE boarding school, made legislative changes that impacted our student funding formula and helped promote favorable decisions in support of REAA's in general.

What I find refreshing about John is he is honest, genuinely cares about our school district and is responsive/innovative in his approach to using the legislative process.

We find John's services to be of great value and have signed to retain his services for another two years.

If I can be of further assistance regarding John's consultation he provides LYSD please don't hesitate to call me.

Sincerely,

Gene Stone

*CHILDREN FIRST*

Alakanuk Emmonak Hooper Bay Kotlik Marshall Mt. Village Pilot Station Russian Mission Scammon Bay Nunam Iqua

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October 27, 2021

To whom it may concern:

I would strongly recommend John Walsh for any position representing local government or a rural Alaska community before the state Legislature.

We have published the Alaska Legislative Digest and Alaska Economic Report since the 1970s and have closely monitored the Legislature and Alaska political development over those years.

I have known John for years. He comes from a respected family with deep roots in rural Alaska communities. I find him very knowledgeable on rural and municipal issues along with the political environment of the Legislature in which we both work.

On many occasions I have asked John for his perspective on legislation and how it affects his clients, which I find helpful in doing my own analysis of the Legislature. On every occasion he has been responsive and helpful, which I appreciate.

Please feel free to contact me with any questions.

Tim Bradner  
Publisher  
Alaska Legislative Digest and Alaska Economic Report

907 440 6068  
timbradner@pobox.alaska.net

**From:** John Walsh jmw Walshco@gci.net  
**Subject:** Fwd: FYI - Reference Letter  
**Date:** October 25, 2021 at 8:00 PM  
**To:** Christine Hess chess@gci.net



In email format (he's traveling).

John Walsh  
Sent from iPhone  
907.321.0983 cell

Begin forwarded message:

**From:** Bobby Bolen <bbolen@bssd.org>  
**Date:** October 25, 2021 at 7:00:22 PM AKDT  
**To:** John <jmw Walshco@gci.net>  
**Subject:** FYI - Reference Letter

To Whom It May Concern:

It is with great pleasure to recommend John Walsh as a potential Lobbyist for your district. John has been a valuable asset to our district for many years. Our Board looks forward to his yearly updates. He is a great addition to our team while visiting Juneau each year. John helps set up meetings, arrange schedules, and usually hosts everyone for a great dinner. John is timely in gathering background information on important issues and is always willing and able to gather more information as necessary. John is also very good at being able to break down many of the legislative issues into everyday common language. It is without reservation that I recommend John Walsh for a lobbyist position within your district.

Respectfully,

Dr. Bobby Bolen  
Superintendent, BSSD

Bobby Bolen, Ed.D.  
Superintendent  
P.O. Box 225  
Unalakleet, AK 99684  
[bbolen@bssd.org](mailto:bbolen@bssd.org)  
SKYPE: robert.bolen5566  
work: 907-624-3611 or 4261  
fax: 907-624-3099  
cell: 907-984-2288

RFP Scoring & Evaluation – Lobbyist Services

J&H Consulting

	Score	Notes:
Completeness of proposal (as per Proposal Format & Guidelines) – 10 points	<b>/10</b>	
Respondent's experience (past performance, work products, timeliness) – 25 points	<b>/25</b>	
References – 10 points	<b>/10</b>	
Fee Schedule/budget proposal – 25 points	<b>/25</b>	
Strategy for accomplishing goals and priorities for the District – 30 points	<b>/30</b>	
<b>TOTAL:</b>	<b>/100</b>	



# 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

### Curriculum Committee Meeting

### Conducted via Teleconference

**CALL-IN:** 1-833-682-3239 or 907-308-3192 **CODE:** 623 583 422#

## Agenda

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### November 29, 2021

9:30 am

1. Call to Order
2. Appoint Committee Chair
3. Dana Orton, Director
  - a. Curriculum Department Long Term Plan
  - b. Know and Value Students
    - i. MTSS Protocols and Procedures
      1. Student Data Usage
        - a. Multi-Tiered System of Supports
        - b. Student Data Teams
        - c. DIBELS
        - d. ALEKS
      - ii. Develop Inupiaq Science Curriculum
        1. Inupiaq Science Curriculum Update
    - c. Responsive Learning Environments
      - i. Summer Credit Recover Program & Reading Programs
        1. Student Success Committee
      - ii. Curriculum Reviews and Adoptions
        1. English/Language Arts Curriculum Review/Adoption Update
    - d. Student Engagement
      - i. Teacher Clarity
      - ii. Instructional Coaching
        1. Literacy Connections – Literacy Grant
          - a. Overview & Supports
          - b. ECRI Overview
      - iii. Curriculum and Standards Alignment
    - e. Collaborative Meeting and Targeted Professional Development
      - i. Professional Learning Communities (PLCs)
      - ii. NWABSD Collaborative Plan
  4. Committee Member Comments

**Committee Members:** Carol Schaeffer, Marie Greene, Margaret Hansen, Lawrence Jones Sr., Alice Adams

**Curriculum Director:** Dana Orton

**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.



# Curriculum and Instruction

Northwest Arctic Borough School District  
November 29 Curriculum Committee Meeting

# Agenda

- Curriculum Department Long Term Plan
- Know and Value Students
  - Multi-Tiered Systems of Supports
  - Inupiaq Science Curriculum
- Responsive Learning Environments
  - Summer Credit Recovery and Reading Programs
  - Curriculum Review and Adoptions
- Student Engagement
  - Teacher Clarity
  - Instructional Coaching
  - Curriculum Standards Alignment
- Collaborative Meeting and Targeted Professional Development
- Questions and Comments

# Curriculum Department Long Range Plan

## Student Learning

### KNOW AND VALUE STUDENTS

- MTSS Protocols & Procedures
- Develop Iñupiaq Science Curriculum

### RESPONSIVE LEARNING ENVIRONMENTS

- Summer Credit Recover Program & Reading Programs
- Curriculum Reviews and Adoptions

### STUDENT ENGAGEMENT

- Teacher Clarity
- Instructional Coaching
- Curriculum and Standards Alignment



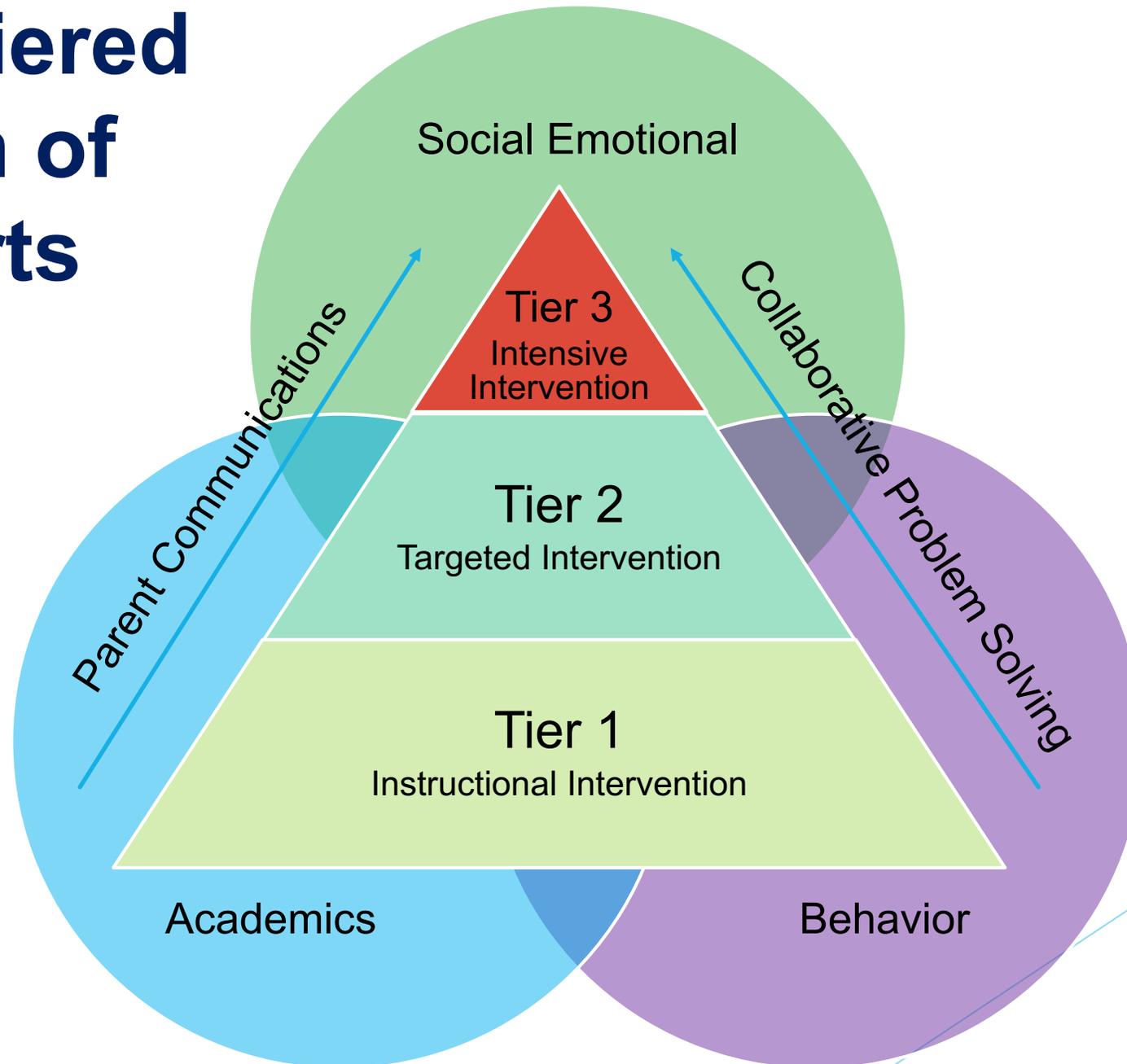
# Curriculum Long Range Plan

## KNOW AND VALUE STUDENTS

- Multi-Tiered System of Supports
  - Adoption and implantation of Embrace
  - Input of historical data
  - Embrace training
  - Formation of dedicated Student Data PLCs
  - PLC meeting times for data discussion and intervention suggestion
  - Data review and archiving at end of each year

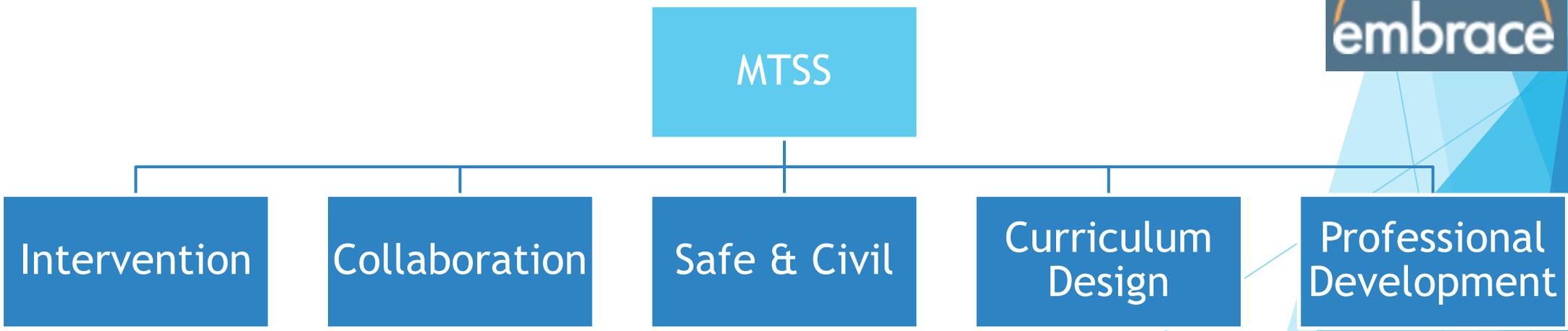


# Multi-Tiered System of Supports





# MTSS Umbrella



# Student Data

- Benchmarking
  - DIBELS (3 times year)
  - MAPS (3 times year)
  - ALEKS Knowledge Checks (as requested)
- Progress Monitoring
  - DIBELS (Monthly/Bi-monthly)
  - DIBELS (Weekly during intervention)
  - Classroom Assessment
  - Formative Assessment
    - Checklist
    - Exit Tickets
    - Student work



# Student Data

- Inform instruction
  - Create lesson plans
  - Revisit/reteach concepts, skills, or standards
- Assess learning
- Identify student needs
  - Enrichment
  - Intervention
- Identify learning gaps



# DIBELS

- Dynamic Indicators of Basic Early Literacy Skills
- Set of procedures and measures for assessing the acquisition of literacy skills
  - short (one minute) fluency measures
  - universal screening
  - benchmark assessment
  - progress monitoring
  - Kindergarten to 8th grade



# DIBELS Testing Timeline

Maze

Oral Reading Fluency (ORF)

Word Reading Fluency (WRF)

Nonsense Word Fluency (NWF)

Phoneme Segmentation Fluency (PSF)

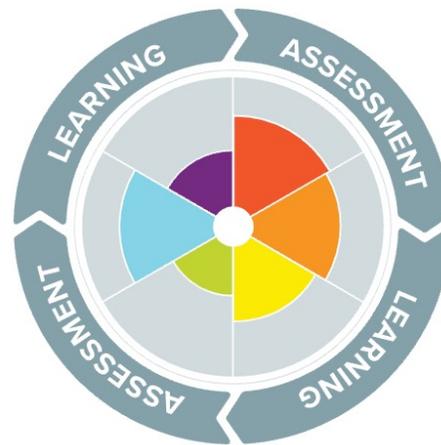
Letter Naming Fluency (LNF)

Beg	Mid	End	Beg	Mid	End	Beg	Mid	End	Beg	Mid	End	Beg	Mid	End	Beg	Mid	End	Beg	Mid	End	Beg	Mid	End			
Kindergarten			First Grade			Second Grade			Third Grade			Fourth Grade			Fifth Grade			Sixth Grade			Seventh Grade			Eighth Grade		



# ALEKS

- University of California, Irvine
- Funding from the National Science Foundation
- Artificial intelligent learning and assessment system
  - Determine precisely what each individual student knows
  - Determines what the student is ready to learn next
  - Integrated with NWABSD's math Curriculum
    - Grades 3 - Algebra II



# Student Data Teams

- Site based
- Meet approximately every three weeks
- Identify students who need additional supports
  - Develop and suggest student interventions
  - Record data into the Embrace system
- Identify instructional needs across the school
  - Develop and suggest whole group interventions
  - Brainstorm/share teaching strategies to meet student needs
- Identify how to move student learning forward



# Curriculum Long Range Plan

## KNOW AND VALUE STUDENTS

- Develop Iñupiaq Science Curriculum
  - Identify resources and archives
  - Hiring of Staff Development Specialist to coordinate the project
  - Identify and create a project development committee, project advisory board.
  - Identify needs and begin mapping new curriculum.
  - Develop a website with information concerning the project.
  - Incorporate place-based professional development to staff.
  - Project development team, Advisory council, and consultant advisor meet with to develop plans, needs, and community involvement
  - Develop course materials for Physical/Earth Science, Biology, and Environmental Science.



# Inupiaq Science Curriculum

- Two Positions
  - Staff Development Specialist (Curriculum Coordinator)
  - Staff Development Specialist (Inupiaq Materials and PD Planner)
- Project Development Committee
  - Teachers, staff development personnel, elders (5)
  - 3 meetings per year
- Project Advisory Committee
  - Staff Development personnel, elders, stakeholders (6)
  - 3 meetings per year



# Inupiaq Science Curriculum

- Resources

- University of Alaska

- Lori Schoening & Doreen Hayward, Christie Hauptert
    - Kiuguyat: Northern Lights
    - Qanniksuq: It is Snowing
    - Kotz-ACEP Energy Education

- Buckland/Noatak Beluga Curriculum

- REACH Up Project – Samuel Norlin

- Village Science - The Alaska Native Knowledge Network



# Curriculum Long Range Plan

## RESPONSIVE LEARNING ENVIRONMENTS

- Summer Credit Recover Program & Reading Programs (2021)
  - Develop, advertise, and register participants for Summer of Reading program and provide book sets to students.
  - Order supplies, materials, books and prizes annually.
  - Students attend credit recovery program customized for each student.
  - Tally and distribute prizes for Summer of Reading.



# Student Success Committee

*2016-2021 Strategic Plan*

## **Goal 1: Student Learning**

Strategy 1: Provide a positive learning environment for all students.

*Objective 2: Strengthen Student Progress Monitoring*

*Action 2: Establish a district grading system task force.*

- The Grading System Committee was formed to research current grading practices and suggest possible changes to grading practices in our region in fall of 2020.
- Findings were brought to the NWABSD Curriculum Committee in June 2021. At that time, the committee requested more information gathered.



# Student Success Committee

- Seated in September
- Reviewed Board policy
  - grades and evaluation of student achievement
  - attendance
  - homework
  - communication with parents/guardians
- Developed supporting document
  - middle/high school teachers
  - policy and recommended procedures from Safe & Civil Schools
  - grading guidelines
- Committee recommended additional training annually
- Committee request no other action be taken at this time



# Curriculum Long Range Plan

## RESPONSIVE LEARNING ENVIRONMENTS

- Curriculum Reviews and Adoptions (2021)
  - Develop a Curriculum Committee to review curriculum and curriculum materials.
  - Meet to review current curriculum and supplemental materials.
  - Recommend any changes to curriculum and supplemental materials.
  - Present recommendations to board and community as directed.
  - Provide professional development on curriculum if needed.
  - Implement new curriculum as needed.



# ELA Curriculum Review/Adoption

Curriculum Area	Curriculum Review	Purchase Textbooks & Materials	Implementation
HS Physical Science, Biology, and Environmental Science	2020-2021	Spring 2022-24	2022-2025
English Language Arts K-12	2021-2022	Spring 2022	2022-2023
Math	2023-2024	Spring 2024	2024-2025
Social Studies/Health	2025-2026	Spring 2026	2026-2027
Science K-8, HS Physics & Chemistry	2025-2026	Spring 2026	2026-2027



# ELA Curriculum Review/Adoption

- Three offerings reviewed
  - MS/HS committee members - October 29<sup>th</sup> & 30<sup>th</sup>
  - K-5 committee members - November 5<sup>th</sup> & 6<sup>th</sup>
- Samples received and disbursed to members for review
- Meeting Schedule
  - December 3<sup>rd</sup> & 4<sup>th</sup>
  - January 6<sup>th</sup> & 7<sup>th</sup>
  - Additional meetings in January if needed



# Curriculum Long Range Plan

## STUDENT ENGAGEMENT

- Teacher Clarity
- Paraprofessionals, teachers and administrators participate in professional development (10 each year, Visible Learning & Highly Effective Schools)
  - Review of lesson plan template
  - Learning intentions and success criteria noted in all lesson plans
  - Common vocabulary is shared by the district and used in each school
  - Instructional staff incorporate Visible Learning practices into instruction with fidelity
  - Participate in teacher clarity survey
  - Examine appropriate adjustments as needed
  - Review adjustments of lesson plan template as needed



# Curriculum Long Range Plan

## STUDENT ENGAGEMENT

- Instructional Coaching
  - Provide Instructional coaching professional development to principals, Technology coordinator, and staff development specialist
  - Support principals and coaching team with informal coaching activities
  - Provide Instructional coaching professional development to literacy staff development specialist
  - Coaching team develops protocols for coaching process
  - Coaching team attends ICG Conference
  - Coaching team begins formal coaching during site visits and virtually
  - Teachers provide feedback on the coaching process
  - Additional district wide instructional coaches are added



# Literacy Connections (LIT) – Grant

- **\$3.8 million** over 5 years
- Two Literacy Specialist
  - Staff Development (on-site and virtual)
  - Travel to sites four times per year
- Two Book Distributions per year
  - Development of focused lesson plans
  - Family Literacy Nights (four per year)
- Fourteen Extra Duty Contracts
  - Library and literacy work at site
  - 2 hours per week during school year



# Enhanced Core Reading Instruction

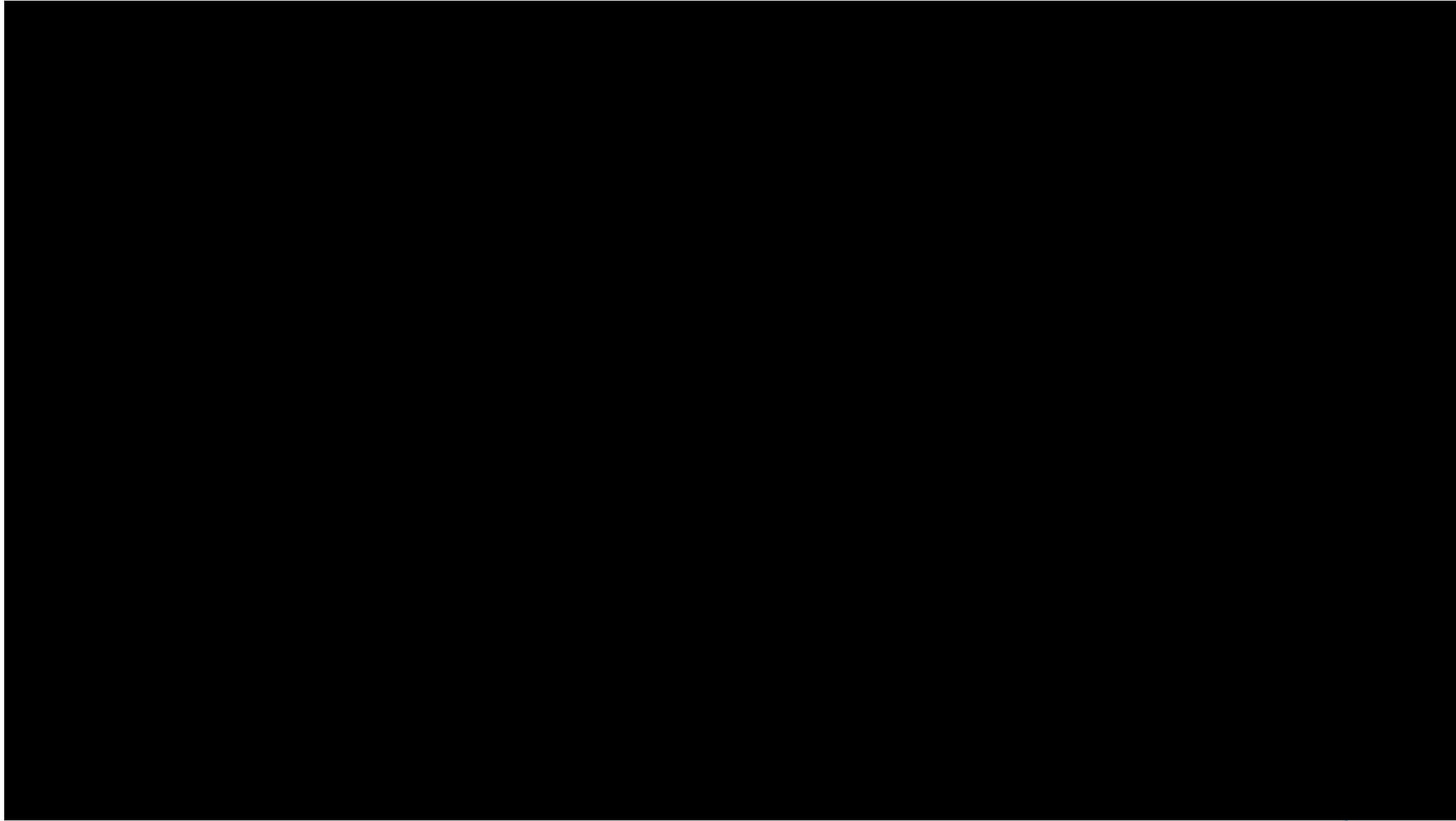
- Enhanced Core Reading Instruction (ECRI) is a multi-tiered reading intervention for K-2 designed to meet the learning needs of students at-risk in reading
- Enhancing Core Reading Instruction model
  - explicit core reading instruction
  - critical reading content
  - clear and systematic
  - deliberate and frequent practice



- ☑ Phonological awareness
- ☑ Phonics/word study
- ☑ Comprehension
- ☑ Fluency
- ☑ Vocabulary



# Enhanced Core Reading Instruction



# Curriculum Long Range Plan

## STUDENT ENGAGEMENT

- Curriculum and Standards Alignment
  - Paraprofessionals, teachers and administrators participate in professional development through IPRARS grant
  - PLC meeting times for identifying the "Power Standards"
  - High school schedule is further aligned district-wide to benefit student learning
  - Professional development – identifying scope and sequence
  - PLC meeting times for identifying the scope and sequence
  - Professional development is given on assessment development
  - PLC meeting times for developing common assessments
  - Professional development is given on unit development
  - PLC meeting times for developing units



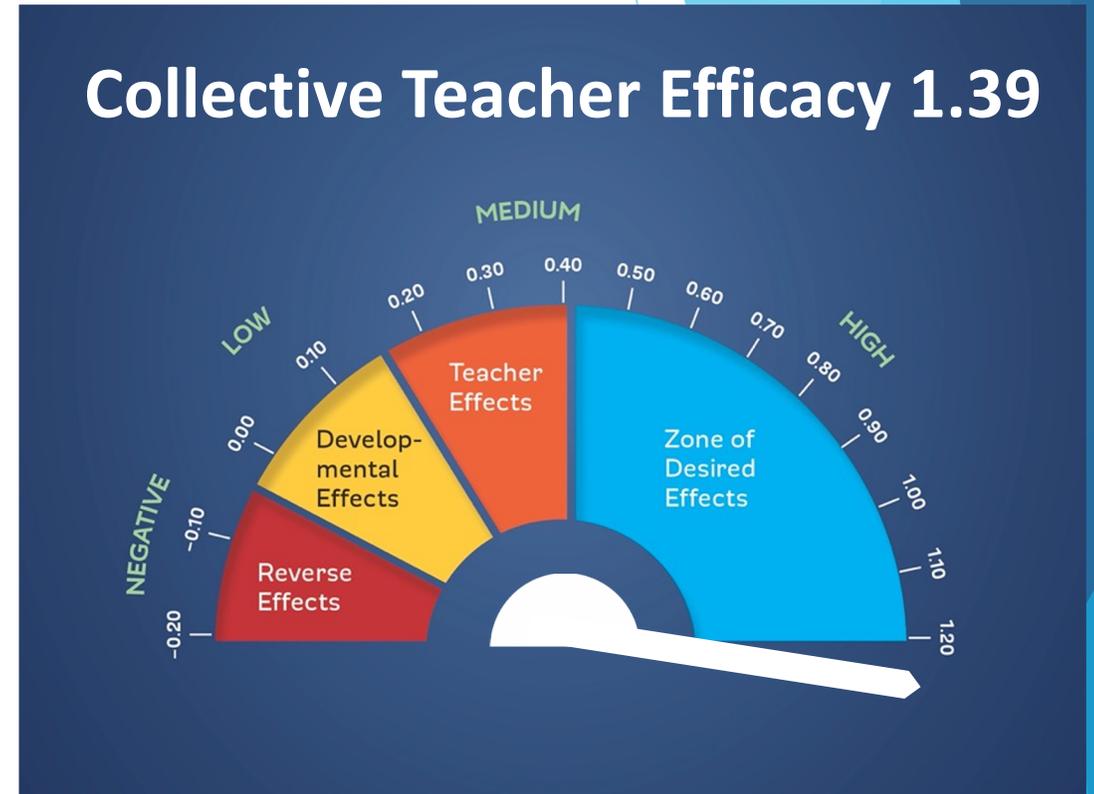
# Professional Learning Communities

- Professional Learning Communities (PLCs) are teams of instructional staff that meet regularly in an environment that encourages professional development, growth, collaboration, and innovation.



# Professional Learning Communities (PLCs)

- Research suggests positive school reform and improved student achievement occur when teachers participate in PLCs.
- Collective teacher efficacy (the collective belief of teachers in their ability to positively affect student learning) is an effect of productive PLCs that is three times more powerful than almost any other school factor



Wilson, A. (2016). From Professional Practice to Practical Leader: Teacher Leadership in Professional Learning Communities. *International Journal of Teacher Leadership*, V. 7, N. 2, Fall 2016.

<https://files.eric.ed.gov/fulltext/EJ1137497.pdf>

<https://leadinglearningmatters.wordpress.com/2018/07/30/plc-commitment-to-learning-common-work-collective-efficacy/>

# NWABSD Professional Development (PD)

## NWABSD Strategic Plan Requirements

<b>1.1.1 Culturally Relevant Learning</b>	20 hours PD & Collaboration
<b>1.1.2 Data PLCs/Embrace</b>	3 hours PD & 18 hours Collaboration
<b>1.1.3 Place-based</b>	2-6 hours PD per year
<b>1.2.1 Equitable Access</b>	2 hours PD
<b>1.2.2 Videos for Offline Remote Learning</b>	10 hours PD & Collaboration
<b>1.3.1 Teacher Clarity &amp; Feedback</b>	40 hours PD & 18 hours Collaboration
<b>1.3.2 Class Discussion</b>	20 hours PD
<b>2.1.1 ALICE</b>	3-4 hours PD per year
<b>2.2.1 STOIC</b>	10 hours PD
<b>2.2.3 Virtual Incidents &amp; Harm to Self</b>	2 hours PD per year



# NWABSD Professional Development (PD)

## Increasing Performance and Retention in Alaska's Rural Schools Grant (IPRARS)

**Required Professional Development** 40 hours per year\*\*

\*\*FY22 will cover Visible Learning including 1.3.1 and 1.3.2 of Strategic Plan

## Other Professional Development

<b>Suicide Prevention</b>	3-4 hours per year
<b>Non-Violent Crisis Intervention</b>	3-4 hours per year
<b>First Aid/CPR</b>	4-8 hours per year
<b>Safe &amp; Civil Schools</b>	2-6 hours per year (4-12 hours for new teachers)
<b>Classroom Interventions</b>	4-6 hours per year
<b>DIBELS</b>	4 hours PD & 3-4 hours of collaboration
<b>ECRI</b>	12 hours of PD for new teachers & 3-4 hours of collaboration
<b>State Testing</b>	3 hours per year
<b>Report Card and Grading</b>	2-4 hours per year

# NWABSD Collaborative Plan

## 1. Grade level/Content PLCs

- Shared teaching strategies
- Develop and identify curriculum
- Identify “Power Standards”
- Develop scope and sequence
- Develop assessments to support the curriculum

## 2. Data PLCs

- To assess the student data
- Identify students who need additional support
- Suggest intervention and enhancement supports to be implemented by the classroom teacher



# NWABSD Collaborative Plan

## Monday & Tuesday Collaborative Meetings & Targeted Professional Development

- Data PLC meetings
- Grade level/Content PLC meetings
- Targeted professional development
- Targeted site collaboration

Note:

The current plan would include site staff meetings and collaboration times.

See tentative draft schedule for details.



# Questions ?



# DIBELS

Dynamic Indicators of Basic Early Literacy Skills 8<sup>th</sup> Edition

<https://dibels.uoregon.edu/>

## Letter Naming Fluency *(Beginning Kindergarten – End of 1<sup>st</sup> Grade)*

y N F s g P G d S x

---

t p T H a m R j n b

## Phoneme Segmentation Fluency *(Beginning Kindergarten – End of 1<sup>st</sup> Grade)*

day /d/ /A/	all /o/ /l/	in /i/ /n/	/6
gave /g/ /A/ /v/	road /r/ /O/ /d/	path /p/ /a/ /th/	/9

## Nonsense Word Fluency *(Beginning Kindergarten – End of 3<sup>rd</sup> Grade)*

tum nep nop lun hon

---

lut nem san dut nin

## Word Reading Fluency *(Beginning Kindergarten – End of 3<sup>rd</sup> Grade)*

a in of there have

---

it no more we is

## Oral Reading Fluency *(Beginning 1<sup>st</sup> Grade to End 8<sup>th</sup> Grade)*

### 1<sup>st</sup> Grade Example

I like to help my mom clean. My first job is to clean the bathroom. I empty the trash and then I scrub everything until it is clean. Then I sweep and mop the bathroom floor. When I'm done cleaning the bathroom, I sweep and mop the kitchen floor. I tell

### 7<sup>th</sup> Grade Example

There are many frightening creatures that come from pop culture, history, and Hollywood. Zombies are one of those fictional creatures that can cause nightmares and bad dreams. These fictional creatures are dead bodies that come back to life through an infection or curse. Even though people zombies are fake, zombees are not!

Zombees are honey bees or bumble bees that behave in an odd fashion. Whereas normal honey bees and bumble bees fly with purpose, zombees seem to

## **Maze** *(Beginning 2<sup>nd</sup> grade – End 8<sup>th</sup> Grade)*

### 4<sup>th</sup> Grade Example

Lucie lived in a place where it never snowed. This meant that she had never

built
melted
talked

a snowman or made a snow

angel
cousin
story

. She had never thrown a

snowball,

and
but
when

she had never built a snow

cup
fort
stick

or an igloo. Yet Lucie



## Monday Collaborative Meetings & Targeted Professional Development

### Calendar of Topics 2021-2022

\*Topics subject to change

Date	Time	Topic	
<b>August 16</b>	Monday	Certified Evaluations/ Negotiated Agreements/ PTPC Training	Human Resources
<b>August 23</b>	Monday	Fall Map	Robin Gage
<b>August 30</b>	Monday	District Inservice – Visible Learning	
<b>September 6</b>	Monday	Labor Day	
<b>September 13</b>	Monday	District-wide Grade Level/Content PLC Meeting – Introduction, Roles, Norms, and Agendas or <b>Student Data PLC Meeting – Embrace MTSS Training</b>	Kim Addington & Conor McCoy  Embrace Trainer
<b>September 20</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.2.2 Red High-Risk Operational Status Remote Lesson Plans with Instructional Videos or <b>DIBELS Training (K-5 and 6-8 ELA)</b>	Lexie Domaradzki & Shelby Skaanes
<b>September 27</b>	Monday	Site Staff Meeting	Site Principal
<b>October 4</b>	Monday	PowerSchool Grading – All Teachers or <b>Instructional &amp; SPED Aide Training</b>	Robin Gage Jackie Wood/SERRC
<b>October 11</b>	Monday	<b>Student Data PLC Overview and Meeting</b>	Dana Orton
<b>October 18-19</b>	Monday	District Inservice – Visible Learning	
	Tuesday	District Inservice – Visible Learning	
<b>October 25</b>	Monday	<b>Student Data PLC Meeting</b> or <b>Waterford (K-2 teachers DRG, SHG, OBU)</b>	
<b>November 1</b>	Monday	Alaska STEPP Update	Site Principal
<b>November 8</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.1.1 Culturally Responsive Lessons or <b>ECRI Training (K-2)</b>	Lexie Domaradzki & Shelby Skaanes
<b>November 15</b>	Monday	Site Staff Meeting or <b>Instructional &amp; SPED Aide Training</b>	Site Principal Jackie Wood/SERRC
<b>November 22</b>	Monday	<b>Student Data PLC Meeting</b>	
<b>November 29</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.1.1 Culturally Responsive Lessons	
<b>December 6</b>	Monday	Site Staff Meeting	Site Principal
<b>December 13</b>	Monday	<b>Student Data PLC Meeting</b>	
<b>December 20</b>	Monday	Winter Break	
<b>December 27</b>	Monday	Winter Break	



## Monday Collaborative Meetings & Targeted Professional Development

### Calendar of Topics 2021-2022

\*Topics subject to change

<b>January 3</b>	Monday	Site Staff Meeting - Site and Classroom Management Plans --Review and revise	Site Principal
<b>January 4</b>	Tuesday	<b>Student Data PLC Meeting</b>	
<b>January 10</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.3.1 Power Standards	Kim Addington & Conor McCoy
<b>January 11</b>	Tuesday	Site Staff Meeting	
<b>January 17</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.3.1 Power Standards or <b>DIBELS Training (K-5)</b>	Lexie Domaradzki & Shelby Skaanes
<b>January 18</b>	Tuesday	<b>Student Data PLC Meeting</b>	
<b>January 24</b>	Monday	Site Staff Meeting	
<b>January 25</b>	Tuesday	District-wide Grade Level/Content PLC Meeting – 1.3.1 Power Standards	
<b>January 31</b>	Monday	Site Staff Meeting - RTI/Effective Instruction Conference Follow-up or <b>Instructional &amp; SPED Aide Training</b>	Site Principal Jackie Wood/SERRC
<b>February 1</b>	Tuesday	<b>Student Data PLC Meeting</b>	
<b>February 7</b>	Monday	District-wide Grade Level/Content PLC Meeting– 1.3.1 Power Standards or <b>ECRI Training (K-2)</b>	Lexie Domaradzki & Shelby Skaanes
<b>February 8</b>	Tuesday	Site Staff Meeting	
<b>February 14</b>	Monday	District Inservice – Visible Learning	
<b>February 15</b>	Tuesday	District-wide Grade Level/Content PLC Meeting– 1.3.1 Power Standards	
<b>February 21</b>	Monday	<b>Student Data PLC Meeting</b>	
<b>February 22</b>	Tuesday	Site Staff Meeting	
<b>February 28</b>	Monday	State Assessment Preparation or <b>ECRI Training (K-2)</b> or <b>Instructional &amp; SPED Aide Training</b>	Robin Gage Lexie & Shelby Jackie Wood/SERRC
<b>March 1</b>	Tuesday	Site Staff Meeting	
<b>March 7</b>	Monday	District-wide Grade Level/Content PLC Meeting– 1.3.1 Power Standards or <b>DIBELS Training (6-8 ELA)</b>	Lexie Domaradzki & Shelby Skaanes
<b>March 8</b>	Tuesday	<b>Student Data PLC Meeting</b>	
<b>March 14</b>	Monday	Spring Break	



## Monday Collaborative Meetings & Targeted Professional Development

### Calendar of Topics 2021-2022

\*Topics subject to change

<b>March 15</b>	Tuesday	Spring Break	
<b>March 21</b>	Monday	State Assessment Preparation or Instructional & SPED Aide Training	Robin Gage Jackie Wood/SERRC
<b>March 22</b>	Tuesday	Site Staff Meeting	
<b>March 28</b>	Monday	<b>Student Data PLC Meeting</b>	
<b>April 1</b>	Tuesday	District-wide Grade Level/Content PLC Meeting– 1.3.1 Power Standards	
<b>April 4</b>	Monday	District Inservice	
<b>April 5</b>	Tuesday	<b>Student Data PLC Meeting</b>	
<b>April 11</b>	Monday	Alaska STEPP Update	Site Principal
<b>April 12</b>	Tuesday	District-wide Grade Level/Content PLC Meeting– 1.3.1 Power Standards	
<b>April 18</b>	Monday	Site Staff Meeting	
<b>April 19</b>	Tuesday	<b>Student Data PLC Meeting Wrap-up</b>	
<b>April 25</b>	Monday	Grading and PowerSchool End of Year or Instructional & SPED Aide Training	Robin Gage Jackie Wood/SERRC
<b>April 26</b>	Tuesday	Site Staff Meeting	
<b>May 2</b>	Monday	District-wide Grade Level/Content PLC Meeting – 1.3.1 Power Standards, Practices Reflection & Wrap-up	
<b>May 3</b>	Tuesday	Site Staff Meeting	



# 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 Student Activities Committee Meeting Conducted via Teleconference

CALL-IN: 1-833-682-3239 or 907-308-3192 CODE: 623 583 422#

### Agenda

**November 29, 2021  
1:00 P.M.**

I. Alaska Schools Activities Association Update – Craig McConnell

II. Battle of the Books (Teams Update)

School	K	1	2	3 <sup>rd</sup> /4 <sup>th</sup>	5 <sup>th</sup> /6 <sup>th</sup>	MS	HS
AMB			1	1	1	1	
DRG	1		1	1	1		
IAN	1	1	1	1	1		
JNES	1	2	2	5	1	N/A	N/A
KVL	1	1	1	1	1	1	
KMHS	N/A	N/A	N/A	N/A	N/A	1	1
OBU							
ORV					1		
SHG	1	1	1	1	1	1	
WLK	1	1	1	1	1	1	
Total	6	6	8	11	8	5	1

III. 3A Girls' Volleyball Conference Tournament Results

a. Nov 4/5 @ Bethel

1st Place Team - Bethel Warriors (state berth)

2nd Place Team - Nome-Beltz Nanooks (state berth)

3rd Place Team - Barrow Whalers

4th Place Team - Kotzebue Huskies

IV. 1A Mixed-Six Volleyball Conference Tournament Results (at meeting)

a. Nov 19/20 @ Buckland

• Kiana is Red; so the hosting was moved to BKC.

b. State Tournament: Dec 1-3 @ ANC: Dimond HS

**Committee Members:** Tillie Ticket, Joanne Harris, Lawrence Jones, Sr., and Alice Adams

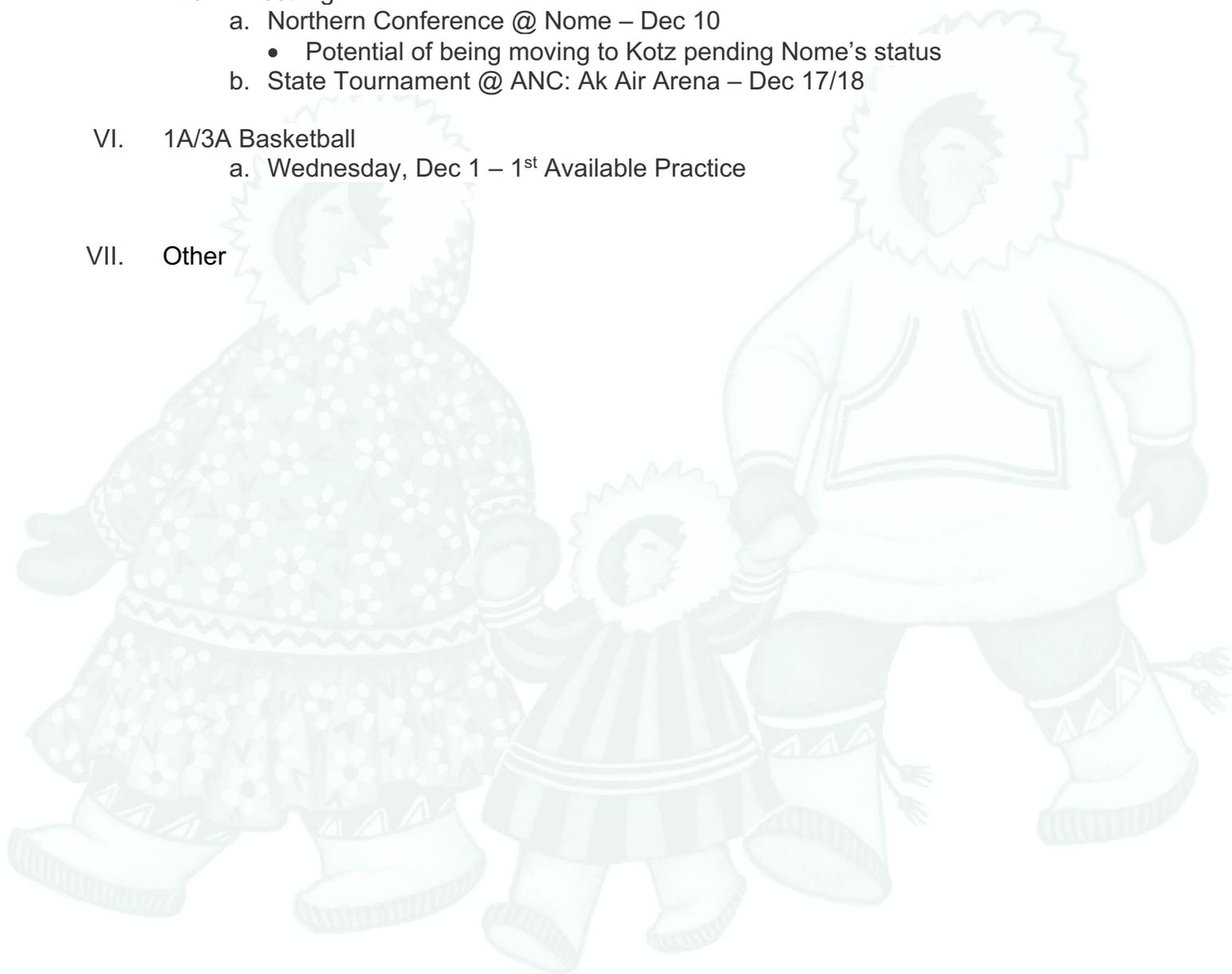
**Student Activities Coordinator:** Brett Slaathaug

**Region 1 NWABSD Member:** Craig McConnell

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.

- V. 123A Wrestling
  - a. Northern Conference @ Nome – Dec 10
    - Potential of being moving to Kotz pending Nome’s status
  - b. State Tournament @ ANC: Ak Air Arena – Dec 17/18
- VI. 1A/3A Basketball
  - a. Wednesday, Dec 1 – 1<sup>st</sup> Available Practice
- VII. Other





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**NWABSD BOARD OF EDUCATION**

**BOARD POLICY COMMITTEE MEETING**

**NOVEMBER 29, 2021  
2:00 P.M.**

**CONDUCTED VIA MICROSOFT TEAMS**  
**CALL-IN: 1-833-682-3239 or 907-308-3192 CODE: 623 583 422#**

**AGENDA**

- 
- I. Policies for First Reading:
    - BP 3000 Concepts and Roles
    - BP 3270 Sale and Disposal of Books, Equipment, and Supplies (Personal Property)
  - I. Article 1 Review
  - II. Clarifications from Board Member Comments at September Meeting:
    - a. AR 0410
    - b. BP 0520
    - c. AR 1312.1
  - III. Comments

**Committee Members:** Cindy Fields Carol Schaeffer, Alice Adams and Shannon Melton.

**Assistant Superintendent:** Scott Lefebvre

**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.

## **BP 3000 CONCEPTS AND ROLES**

The School Board recognizes that money and money management comprise the foundational support of the entire school program. To make that support as effective as possible, the Board intends to:

1. Require advance planning to insure the best possible budget procedures.
2. Explore practical sources of dollar income.
3. Guide the expenditure of funds so as to derive the greatest possible educational returns.
4. Expect sound fiscal management from the administration.
5. Advocate a level of per student funding sufficient to provide quality education.

The Board desires to support the educational program with high standards of safety in the operation and maintenance of school facilities, equipment and services.

### **Role of The Board**

The Board:

1. Solicits public input on educational needs and utilizes that information in making budget decisions.
2. Approves and adopts the annual budget by **April 1.**
3. Transfers between funds shall be made only upon authorization by the Board. Transfers within funds shall be made only upon authorization by the Superintendent below the amount of \$50,000 and only upon authorization by the Board over the amount of \$50,000. All budget transfers will be reviewed by the Board at their next scheduled meeting.
4. Is accountable for all district funds.
5. Adopts written policies governing the purchase of supplies and equipment.
6. Reviews the annual audit of district accounts and business procedures.
7. Adopts an insurance program which complies with law and reflects prudent financial management.
8. Provides for long-range plans to acquire or dispose of sites and to add, maintain and staff new facilities.
9. Advocates and secures community support for additional financing when necessary.

### **Role of Superintendent or Designee**

The Superintendent or designee:

1. Prepares the detailed annual budget and presents it to the Board for adoption.
2. Administers the budget and keeps expenditures within approved limits.
3. Enforces requisition and purchase order policies and regulations.
4. Establishes control/inventory systems to account for district funds, supplies and equipment in accordance with law and Board policy.
5. Makes all financial reports required by law or Board policy and prepares reports for public release.
6. Analyzes the district's financial condition and presents the Board with proposals for meeting financial needs.
7. Provides for the annual audit of district accounts and business procedures.
8. Helps the Board to establish an adequate insurance program.
9. Maintains the district's non-instructional operations.

### **Working Relationships of the Board and Superintendent or Designee**

The Superintendent or designee shall recommend financial plans to the Board in accordance with the district's goals and objectives, whenever district programs may be endangered by a lack of funds or when the continuation of district programs may result in an over expenditure of district funds.

The Board desires complete information from the Superintendent or designee on all matters relating to the district's financial operations. The Board shall closely scrutinize all district financial operations so that it may fully discharge its legal responsibilities with regard to school finance.

*(cf. 3460 - Financial Reports and Accountability)*

*Legal Reference:*

ALASKA STATUTES

[14.08.101](#) Powers (Regional School Boards)

[14.08.111](#) Duties (Regional School Boards)

[14.12.020](#) Support, Management and Control

[14.14.060](#) Relationship between borough school district and borough

[14.14.065](#) Relationship between city school district and city

[14.14.090](#) Additional duties

Adopted: February 25, 1994

**Northwest Arctic Borough School District**

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## **BP 3270 SALE AND DISPOSAL OF BOOKS, EQUIPMENT AND SUPPLIES (PERSONAL PROPERTY)**

The District shall obtain a fair market value for surplus or obsolete books, equipment and supplies, or student group projects, and to include revenue from these sources in the budget. Disposal of any school property shall be accomplished only with the approval of:

the Superintendent for an item with a value of up to \$10,000 or;

the Board for an item with a value over \$10,000.

Sale of surplus, obsolete supplies, student group projects, and equipment will be by public auction or sealed bid.

Student projects, under this section, shall be defined as those in which the materials were purchased by the District.

Individual student projects, which are sold under a program offered by the school, shall be sold at prices established in conjunction with the program sponsor and the local administrator. Funds received under this program shall be returned to the student minus the cost of materials purchased by the District.

### **Surplus Property Disposal**

It shall be the policy of the District to allow the local administrator, with approval of the Advisory School Board and the Superintendent, to dispose of broken, obsolete, outdated or unusable materials and equipment. In such cases, the local administrator shall verify that the items in question no longer have monetary or educational value to the District before being destroyed or released to the public. Books not sold will be offered to the public free of charge. In the case of equipment, procedures shall be followed so that the item is removed from the District inventory.

*Adopted: February 25, 1994*

**Northwest Arctic Borough School District**

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## **TITLE XL POLICY**

### **1. Introduction**

The District encourages members of the District community to report sexual harassment. This procedure only applies to conduct defined sexual harassment under Title IX and applicable federal regulations and that meet Title IX jurisdictional requirements. The District will respond to sexual harassment and sexual misconduct that falls outside that definition and outside the jurisdiction of the Title IX federal regulations using Alaska law and applicable District policies and procedures. In implementing these procedures discussed below, the District will also provide supportive measures, training, and resources in compliance with federal and State law, unless they preempted by the Title IX regulations.

### **2. Title IX Coordinator**

Questions concerning Title IX may be referred to as the District's Title IX Coordinator.

The Title IX Coordinator is required to respond to reports of sexual harassment or misconduct. The Title IX Coordinator will handle information received with the utmost discretion and will share information with others on a need-to-know basis. For example, the Title IX Coordinator may need to address public safety concerns on District property, comply with state and federal legal requirements, or share information to implement supportive measures.

A report of sexual harassment to the Title IX Coordinator does not necessarily lead to a full investigation, as discussed more fully below. The Title IX Coordinator will make an assessment to determine if there is a safety risk to the District. If the Title IX coordinator finds there is a continued risk, the Title IX Coordinator will file the formal complaint without the Complainant's consent or cooperation.

### **3. Title IX Harassment Complaints and Investigations**

These Title IX sexual harassment procedures protect students, employees, applicants for employment, and applicants for admission.

### **Jurisdictional Requirements – Application of Procedures**

These procedures apply if the conduct meets the following three jurisdictional requirements:

**TITLE XL POLICY**

- The conduct took place in the United States;
- The conduct took place in a District “education program or activity.” This includes locations, events, or circumstances over which the District exercised substantial control over both the Respondent and the context in which the harassment occurred, including on-campus and off-campus property and buildings the District owns or controls or student organizations officially recognized by the District own or control; and
- The conduct meets the definition of Title IX “sexual harassment”

**4. Definitions**

**Complainant:** A Complainant is an individual who alleges he/she/they is the victim of conduct that could constitute sexual harassment.

**Consent:** Consent means affirmative, conscious, and voluntary agreement to engage in sexual activity. Both Parties must give affirmative consent to sexual activity. It is the responsibility of each person involved in the sexual activity to ensure that he/she/they has the affirmative consent of the other or others to engage in the sexual activity. Lack of protest, lack of resistance, or silence do not indicate consent. Affirmative consent must be ongoing throughout a sexual activity and one can revoke his/her/their consent at any time. The existence of a dating relationship between the persons involved, or the fact of past sexual relations between them, is not an indicator of consent.

The Respondent’s belief that the Complainant consented will not provide a valid defense unless the belief was actual and reasonable, based on the facts and circumstances the Respondent knew, or reasonably should have known, at the time of the incident. A Respondent’s belief is not a valid defense where:

- The Respondent’s belief arose from the Respondent’s own intoxication or recklessness;
- The Respondent did not take reasonable steps to ascertain whether the Complainant affirmatively consented; or
- The Respondent knew or a reasonable person should have known that the Complainant was unable to consent because the Complainant was incapacitated, in that the Complainant was:
  - Asleep or unconscious;
  - Unable to understand the fact, nature, or extent of the sexual activity due to the influence of drugs, alcohol, or medication; or
  - Unable to communicate due to a mental or physical condition.

**Decision-maker:** The person who will make a determination of responsibility. The Decision-maker cannot be the Title IX Coordinator or the investigator.

**TITLE IX POLICY**

**Formal Complaint:** A written complaint signed by the Complainant or Title IX Coordinator, alleging sexual harassment and requesting an investigation. If the Title IX Coordinator signs the formal complaint, he/she/they will not become a Party to the complaint.

**Parties:** As used in this procedure, this means the Complainant and Respondent.

**Respondent:** A Respondent is an individual reported to be the perpetrator of conduct that could constitute sexual harassment.

**Sexual Harassment under Title IX:** Conduct that satisfies one or more of the following:

- A District employee conditions the provision of an aid, benefit, or service of the District on an individual's participation in unwelcome sexual conduct (quid pro quo harassment);
- Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the District's education program or activity;
- Sexual assault, as defined in 20 U.S.C. 1092(f)(6)(A)(v);
- Dating violence, as defined in 34 U.S.C. 12291(a)(10);
- Domestic violence as defined in 34 U.S.C. 12291(a)(8); or
- Stalking as defined in 34 U.S.C. 12291(a) (30).

**5. Reporting Options**

Any individual may report sexual harassment to the District's Title IX Coordinator. All District employees with knowledge of allegations of sexual harassment must report the allegations, including the name of the Complainant, the Respondent, and any other witnesses, and the date, time, and location of the alleged incident to the Title IX Coordinator promptly.

The District strongly encourages prompt reporting of sexual harassment. Prompt reporting allows for the collection and preservation of evidence, including physical evidence, digital media, or witness statements. A delay may limit the District's ability to effectively investigate and respond.

Individuals have the opportunity to decide whether they want to pursue a formal Title IX complaint. Reporting sexual harassment to the Title IX Coordinator does not automatically initiate an investigation under these procedures. A report allows the District to provide a wide variety of support and resources to impacted individuals and to prevent the reoccurrence of the conduct. A Complainant or the Title IX Coordinator filing a formal complaint will initiate an investigation.

**TITLE XL POLICY**

If there are parallel criminal and Title IX investigations, the District will cooperate with the external law enforcement agency and will coordinate to ensure that the Title IX process does not hinder the legal process or proceedings.

**Mandatory Reporting by District Employees to the Title IX Coordinator**

All District employees must report allegations of sexual harassment to the Title IX Coordinator promptly.

**6. Intake and Processing of Report****Receipt of Report**

After receiving a report of sexual harassment, the Title IX Coordinator will contact the Complainant and reporting party to explain rights under this policy and procedure and invite the Complainant to an in-person meeting. The Title IX Coordinator will discuss supportive measures with the Parties.

**Timeframe for Reporting**

The District does not limit the timeframe for reporting sexual harassment. However, to promote timely and effective review, the District strongly encourages individuals to report sexual harassment as soon as possible, because a delay in reporting may affect the District's ability to collect relevant evidence.

**Supportive Measures**

Supportive measures are non-disciplinary, non-punitive individualized services offered free of charge to the Complainant or the Respondent regardless of whether a formal complaint has been filed. The District will provide the Complainant and Respondent with supportive measures as appropriate and as reasonably available to restore or preserve equal access to the District's education program or activity. These measures are designed to protect the safety of all Parties, protect the District's educational environment, or deter sexual harassment. The District will provide supportive measures on a confidential basis and will only make disclosures to those with a need to know to enable the District to provide the service. Supportive measures may include counseling, extensions of deadlines, other class-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the Parties, leaves of absence, increased security, and monitoring of certain areas of the campus, and other similar measures.

**TITLE XL POLICY****7. Removal of Respondent Pending Final Determination**

Upon receiving a report regarding sexual harassment, the Title IX Coordinator will make an immediate assessment concerning the health and safety of the Complainant and campus community as a whole. The District has the right to order emergency removal of a Respondent, or if the Respondent is an employee, place the employee on administrative leave.

**Emergency Removal**

The District may remove a non-employee Respondent from the District's education program or activity on an emergency basis after it conducts an individualized safety and risk analysis and determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal.

Emergency removal is not appropriate to address a Respondent's threat of obstructing the sexual harassment investigation or destroying relevant evidence. Emergency removal is only available to address health or safety risks against individuals arising out of sexual harassment allegations, not to address other forms of misconduct that a Respondent might commit pending the processing of a complaint.

The District's Superintendent or designee will conduct the individualized safety and risk analysis.

If the Superintendent or designee determines emergency removal is appropriate, they or a designee will provide the person the District is removing from campus on an emergency basis with notice and an opportunity to attend a meeting and challenge the basis of their removal. The Superintendent or designee will determine whether the emergency removal from campus order is warranted after considering information provided by the Respondent challenging the emergency removal.

**Administrative Leave**

The District may place an employee Respondent on administrative leave during the pendency of a grievance process described in the formal complaint process below. The District will follow any relevant policies, procedures, collective bargaining agreements, or state law in placing an employee on administrative leave.

**TITLE XL POLICY****8. Formal Complaint Grievance Procedures****Notice to Parties**

Upon receipt of a formal complaint, the Title IX Coordinator will provide the following notice in writing to the known Parties:

- Notice of the District's Title IX grievance process;
- Notice of the sexual harassment allegations with sufficient detail to prepare a response before any initial interview;
- Statement that the Respondent is presumed not responsible for the alleged conduct;
- Statement that the determination of responsibility will not be made until the conclusion of the grievance process;
- Notice that the Parties have a right to an advisor of their choice, who may be, but is not required to be, an attorney;
- Notice that the Parties may inspect and review evidence obtained as part of the investigation that is directly related to the allegations raised in the formal complaint, including the evidence upon which the District does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence, whether obtained from a Party or other source; and
- Notice of any provision in the District's code of conduct or discipline rules that prohibits knowingly making false statements or knowingly submitting false information during the grievance process.
- If in the course of an investigation, the District decides to investigate allegations about the Complainant or Respondent that are not included in the notice provided above, the Title IX Coordinator will provide written notice of the additional allegations to the Parties whose identities are known.

**Dismissal of Formal Complaint**

The District must investigate the allegations in a formal complaint. However, the District must dismiss the formal complaint and will not process the complaint under these procedures if any of the following three circumstances exist:

- If the conduct alleged in the formal complaint would not constitute Title IX sexual harassment as defined in this procedure;
- If the conduct alleged did not occur in the District's education program or activity; or
- If the conduct alleged did not occur against a person in the United States.

**TITLE XL POLICY**

The District has the discretion to dismiss a formal complaint or any allegation under the following circumstances:

- If at any time during the grievance process the Complainant notifies the Title IX Coordinator in writing that he/she/they would like to withdraw the formal complaint or any allegations;
- If the Respondent is no longer enrolled or employed by the District; or
- If there are specific circumstances that prevent the District from gathering evidence sufficient to reach a determination regarding responsibility as to the formal complaint or allegations.

If the District dismissed the formal complaint or any allegations, the Title IX Coordinator will simultaneously provide the Parties with written notice of the dismissal and reason(s). The District will also provide the Parties with their right to appeal.

The District may commence proceedings under other policies and procedures after dismissing a formal complaint.

**Consolidation of Formal Complaints**

The District may, but is not required to, consolidate formal complaints as to allegations of sexual harassment against more than one Respondent, or by more than one Complainant, against one or more Respondents, or by one Party against the other Party where the allegations of sexual harassment arise out of the same facts or circumstances.

**Equitable Treatment of the Parties**

The District's determination of responsibility is a neutral, fact-finding process. The District will treat Complainants and Respondents equitably such that the procedures will apply equally to both Parties. The District will not discipline a Respondent until it reaches a determination of responsibility for sexual harassment against the Respondent at the conclusion of the grievance process.

**Statement of Non-Responsibility**

The investigation is a neutral, fact-finding process. The District presumes all reports are in good faith. Further, the District presumes the Respondent is not responsible for the alleged conduct. The District makes its determination regarding responsibility at the conclusion of the grievance process.

## **TITLE XL POLICY**

### **Bias or Conflict of Interest**

The District's Title IX Coordinator, Investigator(s), Decision-maker(s), or any person designated by the District to facilitate an informal resolution process, will not have potential actual bias or conflict of interest in the investigatory, sanctioning, or appeal process or bias for or against Complainants or Respondents generally. Actual bias is an articulated prejudice in favor of or against one Party or position; it is not generalized concern about the personal or professional backgrounds, positions, beliefs, or interests of the Decision-makers in the process. The District will provide training on bias, conflict of interest, and impartial service to the Title IX Coordinator, investigator, Decision-maker, and facilitator.

### **Timeline for Completion**

The District will undertake its grievance process promptly and as swiftly as possible. The District will complete the investigation and its determination regarding responsibility within 180 calendar days.

When appropriate, the Title IX Coordinator may determine that good cause exists to extend the 180 calendar day period to conduct a fair and complete investigation, to accommodate an investigation by law enforcement, to accommodate the unavailability of witnesses or delays by the Parties, to account for District breaks or vacations, or due to the complexity of the investigation.

The District will provide notice of this extension to the Complainant and Respondent in writing and include the reason for the delay and anticipated timing of completion.

A Party may request an extension from the Title IX Coordinator in writing by explaining the reason for the delay and the length of the continuance requested. The Title IX Coordinator will notify the Parties and document the grant or denial of a request for extension or delay as part of the case record keeping.

### **Role of Advisor**

Throughout the grievance process, both the Complainant and Respondent have a right to an advisor of their choice. An advisor may not be a witness or have a conflicting role in the process, or with a Party. The role of the advisor is to provide support and assistance in understanding and navigating the investigation process. The advisor may not participate in the process as a witness or obstruct an interview or disrupt the process. The Title IX Coordinator has the right to determine what constitutes appropriate behavior of an advisor and take reasonable steps to ensure compliance with this procedure.

## **TITLE XL POLICY**

### **Confidentiality Agreements**

To protect the privacy of those involved, the Parties and advisors are required to sign a confidentiality agreement prior to attending an interview or otherwise participating in the District's grievance process. The confidentiality agreement restricts the dissemination of any of the evidence subject to inspection and review or use of such evidence for any purpose unrelated to the Title IX grievance process. The confidentiality agreement will not restrict the ability of either Party to discuss the allegations under investigation.

### **Use of Privileged Information**

The District's grievance procedure does not require, allow, rely upon, or otherwise use questions or evidence that constitute, or seek, disclosure of information protected under a legally recognized privilege (e.g., attorney-client privilege, doctor-patient privilege, spousal privilege, etc.), unless the person holding the privilege provides voluntary, written consent to waive the privilege.

### **Investigations**

The Title IX Coordinator is responsible for overseeing investigations to ensure timely resolution and compliance with Title IX and these procedures. The Title IX Coordinator can also conduct investigations.

### **Trained Investigators**

The District will investigate Title IX formal complaints fairly and objectively. Individuals serving as investigators under this procedure will have adequate training on what constitutes sexual harassment, Title IX, and how the District's grievance procedures operate. The District will also provide investigators training on issues of relevance to create an investigative report that fairly summarizes relevant evidence and complies with this procedure.

### **Gathering Evidence and Burden of Proof**

The District, and not the Parties, has the responsibility to gather information and interview witnesses. When the investigator evaluates the evidence, they will do so using the preponderance of the evidence standard. After considering all the evidence gathered, the investigator will decide whether it is more likely than not that the reported conduct occurred.

### **Notice of Investigative Interview**

The District will provide written notice of the date, time, location, participants, and purpose of all investigative interviews to an individual whose participation is invited or expected, with sufficient time for the individual to prepare to participate.

## **TITLE XL POLICY**

### **Evidence Review**

Both Parties have an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in the formal complaint, including the evidence upon which the District does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a Party or other source.

Prior to the investigator preparing an investigative report, the District will send to each Party and the Party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy. The Parties will have at least 10 days to submit a written response. The investigator must consider this written response prior to completing the investigative report.

### **Investigative Report**

The results of the investigation of a formal complaint will be set forth in a written report that will include at least all of the following information:

- An executive summary of the allegations and findings as to each allegation;
- A summary of the procedural steps taken during the investigation, including the individuals contacted;
- An analysis of relevant evidence, including witness statements, gathered during the course of the investigation;
- A discussion of the investigator's conclusions about whether the allegations occurred using a preponderance of the evidence standard;
- A list of the relevant documents; and
- A table of contents for any report that exceeds 10 pages.

The investigator may redact information that is not directly related to the allegations or that is privileged. However, the investigator will keep a log of information that is not produced to the Parties. The log will be provided only to the Title IX Coordinator and will not be disclosed to the Parties.

The District will send to the Parties and their advisors, if any, the investigative report in an electronic format or a hard copy, for their review. The Parties will have at least 10 days to submit written, relevant questions that a Party wants to be asked of any Party or witness. The District will provide relevant questions to the Party or witness and set a deadline of no less than 10 calendar days to submit a response. The District will provide each Party with the submitted responses and allow the Parties to submit additional, limited follow-up questions within 10 calendar days. The District will provide each Party with the submitted responses. The Decision-maker must explain to the Party proposing the questions any decision to exclude a question as not relevant.

## **TITLE XL POLICY**

### **Decision-maker**

The Decision-maker will be free from conflict of interest or bias, including bias for or against Complainants or Respondents. In cases where the Complainant or Respondent objects to the Decision-maker on the basis of a conflict of interest, the Complainant or Respondent may request that the Title IX Coordinator select a different Decision-maker. The Complainant or Respondent must make this request to the Title IX Coordinator in writing no later than five (5) business days after the District identifies the Decision-maker to the Parties.

The Decision-maker must objectively evaluate all relevant evidence both inculpatory and exculpatory and must independently reach a determination regarding responsibility. The Decision-maker must receive training on issues of relevance.

### **Determinations of Responsibility**

When the Decision-maker makes a determination of responsibility or non-responsibility, the Decision-maker will issue a written determination regarding responsibility, no later than 4 weeks after the deadline for the Parties to submit a written response to the investigative report.

When making a determination regarding responsibility, a Decision-maker will objectively evaluate all relevant evidence, including both inculpatory and exculpatory evidence. A Decision-maker may not make credibility determinations based on an individual's status as a Complainant, Respondent, or witness. In evaluating the evidence, the Decision-maker will use a preponderance of the evidence standard. Thus, after considering all the evidence, the Decision-maker will determine whether it is more likely than not that sexual harassment occurred.

The Decision-maker will issue a written determination that will include the following:

- Identification of the allegations potentially constituting Title IX sexual harassment as defined in these procedures;
- A description of the procedural steps taken from the receipt of the formal complaint through the determination, including who conducted the investigation gave notifications to the Parties. The determination will also state when, where, and date the investigator interviewed Parties and witnesses, conducted site visits, and the methods used to gather other evidence. The procedural section should also discuss the dates and how the Parties were provided the opportunity to review and inspect evidence;
- Findings of fact supporting the determination. In making these findings, the Decision-maker will focus on analyzing the findings of fact that support the determination of responsibility or non-responsibility;

## **TITLE XL POLICY**

- Conclusions regarding the application of the District's code of conduct or relevant rules to the facts;
- A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility;
- Whether the District will provide remedies designed to restore or preserve equal access to the District's education program or activity to the Complainant.
- A statement of, and rationale for, any disciplinary sanctions the District imposes on the Respondent,

The District need not disclose to the Respondent remedies that do not impact them as part of the written determination. The District can inform the Respondent that it will provide remedies to the Complainant. However, the District will inform the Complainant of the sanctions against the Respondent.

The District's procedures and permissible bases for the Complainant and Respondent to appeal.

The District will provide the written determination to the Parties simultaneously. The determination regarding responsibility becomes final either on the date that the District provides the Parties with the written determination of the result of the appeal, if the Parties file an appeal, or if the Parties do not file an appeal, the date on which an appeal would no longer be considered timely.

### **9. Disciplinary Sanctions and Remedies**

The District must have completed the grievance procedures (investigation and any appeal, if applicable) before the imposing disciplinary sanctions or any other actions that are not supportive measures against a Respondent. If the Decision-maker determines the Respondent was responsible for conduct that constitutes sexual harassment, the District will take disciplinary action against the Respondent and any other remedial action it determines to be appropriate. The action will be prompt, effective, and commensurate with the severity of the offense.

Remedies for the Complainant might include, but are not limited to:

- Providing an escort to ensure that the Complainant can move safely between classes and activities;
- Ensuring that the Complainant and Respondent do not attend the same classes or work in the same work area;
- Providing counseling services or a referral to counseling services;
- Providing medical services or a referral to medical services;
- Providing academic support services, such as tutoring;
- Arranging for a Complainant, if a student, to re-take a course or withdraw from a class without penalty, including ensuring that any changes do not adversely affect the Complainant's academic record; and

## **TITLE XL POLICY**

- Reviewing any disciplinary actions taken against the Complainant to see if there is a causal connection between the harassment and the misconduct that may have resulted in the Complainant's discipline.

Possible disciplinary sanctions for students Respondents include written or verbal reprimand, training or counseling, non-academic probation, suspension, and expulsion. Possible disciplinary sanctions for employee Respondents include written or verbal reprimand, required training or counseling, demotion, suspension, or discharge.

### **10. Appeal of Dismissal of a Formal Complaint or of the Determination of Responsibility**

A Complainant or Respondent may appeal (1) the District's determination regarding responsibility or (2) the dismissal of a formal complaint or any allegations under Title IX. A Complainant or Respondent must submit a written appeal within ten business days from the date of the notice of determination of responsibility or from the date of the District's notice of dismissal of a formal complaint or any allegations.

#### **Grounds for Appeal**

The Superintendent or designee will serve as the Decision-maker on Appeal. In filing an appeal of the District's determination regarding responsibility or the District's dismissal of a formal complaint, the Party must state the grounds for appeal and a statement of facts supporting those grounds. The grounds for appeal are as follows:

- A procedural irregularity affected the outcome;
- New evidence was not reasonably available at the time the District's determination regarding responsibility or dismissal was made, and this new evidence could affect the outcome; or
- The District's Title IX Coordinator, investigator, or Decision-maker(s) had a conflict of interest or bias for or against Complainants or Respondents generally or the individual Complainant or Respondent that affected the outcome.

#### **Appeal Procedure**

If the Complainant or Respondent submit an appeal to the District, the District will:

- Notify the other Party in writing within five business days of receiving a Party's appeal;
- Allow the non-appealing Party at least ten business days of receipt of the appeal to submit a written response in support of, or challenging, the outcome.

**TITLE XL POLICY**

The Decision-maker, on appeal, will issue a written decision on whether to grant or deny the appeal and the rationale for the decision, within 45 business days after the Decision-maker on appeal receives the response to the appeal or the last day to provide a response. The District will provide notice of the written decision simultaneously to both Parties.

The Decision-maker on appeal may extend or otherwise modify the deadlines provided above. Either Party may seek an extension by submitting a written request to the Decision-maker on appeal explaining the need for the extension and the proposed length of the extension. The Decision-maker on appeal will respond to the request within 48 hours in writing and will inform the Parties simultaneously whether the extension is granted.

**Informal Resolution**

If the District determines that a formal complaint is appropriate for informal resolution, it may provide the Parties with the opportunity to participate in an informal resolution process, including mediation, at any time prior to reaching a determination regarding responsibility.

The District will provide the Complainant and Respondent written disclosure of the allegations, the requirements of the informal resolution process including the circumstances under which it precludes the Parties from resuming a formal complaint arising from the same allegations, and any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared.

The District must obtain the Parties' voluntary, written consent to the informal resolution process. If the Parties reach an agreement, the District does not have to complete a full investigation and adjudication of a report of sexual harassment. At any time prior to agreeing to a resolution, any Party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint.

The informal resolution process is not available to resolve allegations that an employee sexually harassed a student.

**11. Retaliation Prohibited**

The District prohibits any intimidation, threats, coercion, or discrimination against any individual who made a report or complaint of sexual harassment, testified, assisted, or participated or refused to participate in any manner in a Title IX investigation or proceeding. Individuals who experience retaliation may file a complaint using the formal complaint process described above.

**TITLE XL POLICY****12. Dissemination of Policy and Procedures**

The District will provide its policy and procedures related to Title IX on its website and in each handbook or catalog provided to applicants for admission and employment, students, employees, and all unions or professional organizations holding collective bargaining with the District.

When hired, employees are required to sign acknowledging that they have received the policy and procedures. The District will place the signed acknowledgment of receipt in each employee's personnel file.

**13. Training**

The District will provide training to Title IX Coordinators, investigators, Decision-makers, and any individual who facilitates an informal resolution process, on the definition of sexual harassment, the scope of the District's education program or activities, how to conduct an investigation and grievance process including appeals and informal resolution processes, as applicable, and how to serve impartially, including by avoiding prejudgment of the facts at issue, conflicts of interest, and bias. Any materials used to train the District's Title IX Coordinator, investigators, Decision-makers, and any person who facilitates an informal resolution process, will not rely on sex stereotypes and must promote impartial investigations and adjudications of formal complaints of sexual harassment.

**14. File Retention**

The District will retain, on file, for a period of at least seven years after closing the case copies of:

- The original report or complaint;
- Any actions taken in response to the complaint, including supportive measures;

The investigative report including all evidence gathered and any responses from the Parties;

- The District's determination regarding responsibility;
- Records of any disciplinary sanctions imposed on the Respondent;
- Records of any remedies provided to the Complainant;
- Any appeal and the result;
- Any informal resolution and the result; and
- All materials used to train Title IX Coordinators, Investigators, Decision-makers, and any person who facilitates an informal resolution process. These training materials are publicly available on this website.

## **TITLE XL POLICY**

The District will make these documents available to the U.S. Department of Education Office for Civil Rights upon request.

*(cf. 0410 Nondiscrimination in District Programs and Activities)*

*(cf. 4030 Nondiscrimination in Employment)*

*(cf. 4119.12 Harassment)*

*(cf. 5145.3 Nondiscrimination)*

*(cf. 5145.7 Sexual Harassment)*

### *Legal Reference:*

#### ALASKA STATUTES

*14.18.010 - 14.18.100 Prohibition Against Sex and Race Discrimination*

#### ALASKA ADMINISTRATIVE CODE

*4 AAC 06.500 - 4 AAC 06.600 Prohibition of Gender or Race Discrimination*

#### UNITED STATES CODE

*Title VI, Civil Rights Act of 1964, 42 U.S.C. §§ 2000d-2000d-7*

*Title IX, Education Amendments of 1972, 20 U.S.C. §§ 1681-1688*

*Vocational Rehabilitation Act of 1973, Sections 503 and 504, 29 U.S.C. § 794*

*Individuals With Disabilities Education Act, 20 U.S.C. §§ 1401-1491*

*Americans With Disabilities Act, 42 U.S.C. §§ 12101-12213*

*Age Discrimination In Employment Act, 29 U.S.C. §§ 621-634*

**NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT**

**Adopted:**

## **Vision-Mission-Goals-Objectives and Comprehensive Plans**

BP 0520(a)

### **SCHOOL ACCOUNTABILITY/SCHOOL IMPROVEMENT**

Note: ~~Since 2013 Alaska has been operating under a flexibility waiver of certain ESEA/NCLB requirements, including school accountability. All flexibility waivers are void as to August 2016. However, under the Every Student Succeeds Act, which amended the ESEA in December 2015, schools identified as priority or focus schools must continue to implement improvement plans and interventions through the 2016-2017 school year.~~ The following policy reflects the Alaska Accountability System which measures both school performance and school progress and results in a school designation of Priority, Focus, or Reward. The school rating may result in required interventions as well as specific supports.

The School Board is committed to the successful performance of the district and its schools. Successful performance is indicated through student academic achievement, student progress over prior year performance, strong attendance and graduation rates, and participation and achievement in college and career readiness exams. The Superintendent shall implement requirements for school and district accountability as determined by the Department of Education and Early Development.

Note: The Alaska School Performance Index measures schools by a combination of data: student achievement on SBAs in reading, writing and math; growth in the school's student body in those assessments from the prior year; and attendance. Schools with high school students are also measured by graduation rates; student performance on college-readiness assessments, including SAT, ACT, and WorkKeys; and student participation rate in WorkKeys. **ASPI points will result in a Star Rating for a school from 1-5 stars, the higher number representing stronger school performance.**

If any district school receives a star rating of one, two, or three stars, the Superintendent or designee shall develop and implement a school improvement plan in accordance with state law. School improvement plans shall be presented to the Board for approval. If the plan is for a school that receives one or two stars, the plan will be submitted to the Department. If the school has been designated as a priority or focus school, the plan will be prepared in consultation with the Department and subject to Department approval.

The Superintendent or designee shall develop and implement a school improvement plan for schools receiving a four-star or five-star rating when necessitated due to failure to meet annual measurable objectives, a decline in the school's growth and proficiency, a decline in graduation rate, or insufficient participation in standards-based assessments.

**SCHOOL ACCOUNTABILITY/SCHOOL IMPROVEMENT** (Continued)

The Superintendent or designee shall develop and implement a district improvement plan when required due to the number of one-star or two-star schools; the number of students who attend one-star or two-star schools; deficiencies in curriculum, assessment practices, instruction, learning environment, professional development, or leadership; or lack of progress by a subgroup towards annual measurable objectives. The District improvement plan shall be approved by the School Board and submitted to the Department.

**School Interventions**

The Superintendent or designee shall implement comprehensive interventions for any school identified as a priority school by the Department. The comprehensive interventions will use turnaround principles that accomplish the following: provide strong leadership; ensure effective teachers; redesign the school calendar to include additional time for student learning and teacher collaboration; improve the instructional program; use student data to inform instruction; establish a school environment that improves safety and discipline; and provide mechanisms for family and community involvement.

Targeted interventions will be implemented to meet the specific needs of schools identified by the Department as focus schools. A plan and timeline to implement the targeted interventions shall be created by the Superintendent or designee. Interventions should consider each of the turnaround principles for priority schools, some or all of which may be appropriate for the school or targeted subgroups. Decisions should be data-driven.

The district will utilize state provided supports in implementing comprehensive or targeted interventions.

**School Success**

The Board believes that all of its schools can be high performing and high progress schools. The district will annually recognize those schools identified as reward schools by the Department.

**SCHOOL ACCOUNTABILITY/SCHOOL IMPROVEMENT (Continued)****Parent Notification**

The Superintendent or designee shall communicate with the parents of children attending schools designated as one- or two-star schools. The information should be in an understandable and uniform format, and, to the extent practicable, in a language the parents can understand. Parents should be promptly advised of:

1. What the star designation means, and how the school compares in terms of academic achievement to other schools in the district and state;
2. The reasons for the designation;
3. Information about how the parents can become involved in addressing the academic issues that led to the designation; and
4. Any action taken to address the problems that led to the designation, including: an explanation of what the school is doing to address low achievement; an explanation of what the district and Department are doing to help; and a description of interventions being taken by the district.

The information in item 4 above shall also be disseminated to the public. Information provided to parents will be sent through direct means such as mail or email. Communications must respect the privacy of students and their families.

*Legal Reference:*ALASKA STATUTE

14.03.123 School and District Accountability

ALASKA ADMINISTRATIVE CODE

4 AAC 06.800 - .899 School and District Accountability

UNITED STATES CODE*Elementary and Secondary Education Act, 20 U.S.C. § 6301, et.seq., as amended by the Every Student Succeeds Act (P.L. 114-95, December 10, 2015)**Revised: June 2017**September \_\_\_\_, 2021*

**NORTHWEST ARCTIC BOROUGH SCHOOL DISTRICT  
ADOPTED: NOVEMBER 25, 2014**

**PUBLIC COMPLAINTS CONCERNING SCHOOL PERSONNEL**

Note: The following optional regulation may be revised or deleted in light of district needs and collective bargaining obligations.

In order to promote fair and constructive communication, the following procedures shall govern the resolution of complaints. Every effort should be made to resolve a complaint at the earliest possible stage. Complaints concerning school personnel should be made directly by the complainant to the person against whom the complaint is lodged. Parents/guardians are encouraged to attempt to orally resolve concerns with the staff member personally.

All written complaints regarding district personnel other than administrators shall be initially filed with the principal or immediate supervisor. If the complaint regards a principal or central office administrator, the written complaint shall be initially filed with the Superintendent or designee. If the written complaint concerns the Superintendent or designee, it shall be initially filed with the Board. If the complaint is also against the district, the principal or designee shall provide a copy of the complaint to the district compliance officer so that appropriate procedures may be followed.

If the complaint cannot be resolved informally by the persons involved, the complainant may submit the complaint in writing to the school principal or immediate supervisor. When necessary, the district shall assist in the preparation of the written complaint so as to meet the requirements of this regulation. The administrative staff shall inform the complainant that such assistance is available if he/she is unable to prepare the written complaint without help. A written complaint must include the name of each employee involved and a brief but specific summary of the complaint and the facts surrounding it. It must also include a specific description of a prior attempt to discuss the complaint with the employee involved and the failure to resolve the matter.

The principal or immediate supervisor shall investigate and attempt to resolve the complaint to the satisfaction of the person(s) involved. If the complaint is resolved, the principal will so advise all concerned parties, including the Superintendent or designee.

If the complaint remains unresolved after review by the principal or the immediate supervisor, the principal shall refer the written complaint, together with a report and analysis of the situation, to the Superintendent or designee. **Complainants should consider and accept the Superintendent or designee's decision as final.** ~~However, the complainant, the employee, or the Superintendent or designee may ask to address the School Board regarding the complaint.~~

**PUBLIC COMPLAINTS CONCERNING SCHOOL PERSONNEL** (Continued)

Except when a complaint is directed against the Superintendent, no party to a complaint may address the Board, ~~either in closed or open session, unless the Board has received the Superintendent or designee's written report concerning the complaint.~~

All parties to a complaint, including the school administration, may be asked **by the School Board** to attend a Board meeting or part of such meeting, for the purpose of presenting all available evidence and allowing every opportunity for explaining and clarifying the issue. The decision of the Board following the hearing shall be final. Complaints before the Board concerning an employee that may tend to be prejudicial to the employee's reputation or character shall be addressed in executive session of the Board.

*(cf. 9321 – Executive Sessions)*

Note: The district should make sure that complaints heard in executive session are indeed complaints against an employee, not against district practice or procedures.
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## Policy Clarifications

4 messages

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Erin Nelson <ennelson@nwarctic.org>  
To: Lon Garrison <lgarrison@asb.org>, Tiffany Jackson <tjackson@asb.org>

Mon, Nov 22, 2021 at 1:26 PM

Good afternoon,

Can I get updated login info for the annual policy updates for the AASB website? I have a few questions, board members requested clarifications at the last board policy committee for AR 0410, BP 0520 and AR 1312.1. I would like to bring the clarifications from AASB to the next board policy committee meeting on November 29.

AR 0410 – For the first highlight, they wanted clarification on definition and how this related to contracted staff? Second highlight – board members agreed they feel it is important to still investigate even if they are no longer employed by the District – is there anything that would prevent us from deleting this bullet point?

### **Dismissal of Formal Complaint**

The District must investigate the allegations in a formal complaint. However, the District must dismiss the formal complaint and will not process the complaint under these procedures if any of the following three circumstances exist:

- If the conduct alleged in the formal complaint would not constitute Title IX sexual harassment as defined in this procedure;
- If the conduct alleged did not occur in the District's education program or activity; or
- If the conduct alleged did not occur against a person in the United States.

This is a question for legal counsel. I am assuming you may be speaking about outside contractors that do not work directly for the district? For instance, many districts may contract with NANA Services for janitorial or food service. I believe that because contracted employees such as food service or janitorial workers are a part of the school district operations they would still fall under the policies and regulations governing the district.

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AR 0410 (g)

### **TITLE XL POLICY**

The District has the discretion to dismiss a formal complaint or any allegation under the following circumstances:

- If at any time during the grievance process the Complainant notifies the Title IX Coordinator in writing that he/she/they would like to withdraw the formal complaint or any allegations;
- If the Respondent is no longer enrolled or employed by the District; or
- If there are specific circumstances that prevent the District from gathering evidence sufficient to reach a determination regarding responsibility as to the formal complaint or allegations.

I would be hesitant to delete this bullet point without further legal guidance. There may be some statutory limitations about the districts ability to pursue a formal complaint against a former employee but that may also be conditioned on what the complaint is about. This section simply states that the district has the discretion( the option) to dismiss.

BP 0520 – Confusion on the star rating system; would like definition of star rating system but the superintendent Terri and another board member thought the star rating system is no longer used by DEED and if so, should references to the star ratings be removed?

Note: The Alaska School Performance Index measures schools by a combination of data: student achievement on SBAs in reading, writing and math; growth in the school's student body in those assessments from the prior year; and attendance. Schools with high school students are also measured by graduation rates; student performance on college-readiness assessments, including SAT, ACT, and WorkKeys; and student participation rate in WorkKeys. ASPI points will result in a Star Rating for a school from 1-5 stars, the higher number representing stronger school performance.

Your version of BP 0520 is out of date. I will send you the update.

AR 1312.1 – First highlight, board member asked what does this mean for the Board's fiduciary and duty of care responsibility related to this statement. Second highlight, a board member wanted clarification and purpose of the final paragraph?

If the complaint remains unresolved after review by the principal or the immediate supervisor, the principal shall refer the written complaint, together with a report and analysis of the situation, to the Superintendent or designee. **Complainants should consider and accept the Superintendent or designee's decision as final.** ~~However, the complainant, the employee, or the Superintendent or designee may ask to address the School Board regarding the complaint.~~

This change to the complaint AR was created to provide a clearer separation of the board and administrative role. However, Board's do not have to agree with this modification and if the board feels it is more appropriate to stay with the original verbiage then please do. In either case, the Board still maintains fiduciary and duty of care responsibility through its direct oversight of the superintendent.

AR 1312.1(b)

### **PUBLIC COMPLAINTS CONCERNING SCHOOL PERSONNEL** (Continued)

Except when a complaint is directed against the Superintendent, no party to a complaint may address the Board, ~~either in closed or open session, unless the Board has received the Superintendent or designee's written report concerning the complaint.~~

All parties to a complaint, including the school administration, may be asked **by the School Board** to attend a Board meeting or part of such meeting, for the purpose of presenting all available evidence and allowing every opportunity for explaining and clarifying the issue. The decision of the Board following the hearing shall be final. Complaints before the Board concerning an employee that may tend to be prejudicial to the employee's reputation or character shall be addressed in executive session of the Board.

This paragraph establishes that the school board is the final arbiter acting in a judiciary function pertaining to a complaint. If the public complaint about an employee remains unresolved, then the board may hear all evidence and make a final determination. These hearings are usually conducted in executive session because they are personnel matters.

(cf. 9321 – Executive Sessions)

Note: The district should make sure that complaints heard in executive session are indeed complaints against an employee, not against district practice or procedures.

Thanks for your help,

Note: The following policy reflects the Alaska Systems for School Success which measures both school performance and school progress and results in a school designation of Comprehensive, Targeted, or Universal. The school rating may result in required interventions as well as specific supports.

The School Board is committed to the successful performance of the district and its schools. Successful performance is indicated through student academic achievement, student progress over prior year performance, strong attendance and graduation rates, and participation and achievement in college and career readiness exams. The [Superintendent/Chief School Administrator] shall implement requirements for school and district accountability as determined by the Department of Education and Early Development.

If any district school receives a Comprehensive or Targeted designation, the [Superintendent/Chief School Administrator] or designee shall develop and implement a school improvement plan in accordance with state law. School and District improvement plans shall be approved by the School Board and submitted to the Department.

Unless the Department approves an alternative improvement planning process, the District shall prepare the school improvement plan for a school designated for Comprehensive support and improvement or Targeted support and improvement. The District shall use of a computerized self-assessment and improvement program selected by the Department that addresses each of the following domains of successful schools:

- (1) curriculum;
- (2) assessment policy and practice;
- (3) instruction;
- (4) school learning environment;
- (5) professional development policy and practices;
- (6) leadership.

### **School Interventions**

The [Superintendent/Chief School Administrator] or designee shall implement comprehensive interventions for any school identified as a Comprehensive school by the Department. The comprehensive interventions will use turnaround principles that accomplish the following: provide strong leadership; ensure effective teachers; redesign the school calendar to include additional time for student learning and teacher collaboration; improve the instructional program; use student data to inform instruction; establish a school environment that improves safety and discipline; and provide mechanisms for family and community involvement.

Targeted interventions will be implemented to meet the specific needs of schools identified by the Department as Targeted schools. A plan and timeline to implement the targeted interventions shall be created by the [Superintendent/Chief School Administrator] or designee. Interventions should consider each of the turnaround principles for Comprehensive schools, some or all of which may be appropriate for the school or targeted subgroups. Decisions should be data-driven.

The District will utilize state provided supports in implementing comprehensive or targeted interventions.

### **School Success**

The Board believes that all of its schools can be high performing and high progress schools. The district will annually recognize those schools identified as reward schools by the Department.

### **Parent Notification**

The [Superintendent/Chief School Administrator] or designee shall communicate with the parents of children attending schools designated as Comprehensive or Targeted schools. The information should be in an understandable and uniform format, and, to the extent practicable, in a language the parents can understand. Parents should be promptly advised of:

1. What the designation means, and how the school compares in terms of academic achievement to other schools in the district and state;
2. The reasons for the designation;
3. Information about how the parents can become involved in addressing the academic issues that led to the designation; and

**SCHOOL ACCOUNTABILITY/SCHOOL IMPROVEMENT** (continued) BP 0520(c)

4. Any action taken to address the problems that led to the designation, including: an explanation of what the school is doing to address low achievement; an explanation of what the district and Department are doing to help; and a description of interventions being taken by the district.

The information in item 4 above shall also be disseminated to the public. Information provided to parents will be sent through direct means such as mail or email. Communications must respect the privacy of students and their families.

*Legal Reference:*

ALASKA STATUTE

14.03.123 School and District Accountability

ALASKA ADMINISTRATIVE CODE

4 AAC 06.800 - .899 School and District Accountability

UNITED STATES CODE

*Elementary and Secondary Education Act, 20 U.S.C. §§ 6301, et. seq., as amended by the Every Student Succeeds Act (P.L. 114-95, December 10, 2015)*

*Revised 3/2021*



# 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

**November 29, 2021**  
**3:00 P.M.**

**Conducted via Teleconference**

**CALL-IN:** 1-833-682-3239 or 907-308-3192 **CODE:** 623 583 422#

### Agenda

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- I. FY22 Financial Narrative Report as of October 31, 2021
- II. FY21 Fund balance review
- III. FY22 Board Budget Revision
- IV. FY22 Budget Revision #1
- V. Borough Health Insurance Update
- VI. Future Business;
  - Food Service/Wellness Committee update
  - Board Health Insurance Options

**Committee Members: Cindy Fields (Chair), Margaret Hansen, Tillie Ticket, Joanne Harris, Marie Greene**

**Director of administrative Service: Megan Williams**

**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.

# Financial Narrative Report October 31, 2021

Administrative Services  
Presented by Megan Williams, Director



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    Financial Summary: Wells Fargo Investment Account Updates

# To Our Board Financial Summary

## Financial Narrative Notes:

Included in this packet are the Statement of Activities reports for FY22, which include reports for School Operating Only, School Operating by OBJ, All Funds, and All funds broken out by object code & Statement of activities for the Board.

We are 25% through the FY22 Fiscal year and have expended just over 25% of our general operating budget, and received just over 25% of our budgeted revenue of our general operating budget.

You will see some expenditure lines in this report that exceed 25% and some that are below 25%. The FY22 Budget Revision #1 should balance those budget lines a little more.

Expenditures exceeded the budget for inservice and parent/public relation, this will be adjusted at the first budget revision.

We have not received a large portion of our Impact Aid funding for FY22 due to the review that we went through in FY21. I will give the Board an update on that funding as soon as I receive more information from The Office of Impact Aid.

Northwest Arctic Borough School District

Statement of Activities-School Operating Only For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
<b>INCOME</b>					
General Revenues					
State Grants & Entitlements (-)	\$6,247,777.00	\$12,660,861.00	\$41,848,608.80	\$29,187,747.80	30.3%
Federal Grants & Entitlements (-)	\$0.00	\$0.00	\$6,858,607.00	\$6,858,607.00	0.0%
Borough Appropriations (-)	\$1,037,987.75	\$1,037,987.75	\$4,151,951.00	\$3,113,963.25	25.0%
E-Rate (-)	\$1,215,640.80	\$1,823,461.20	\$6,860,873.00	\$5,037,411.80	26.6%
Other (-)	\$150,487.00	\$154,202.57	\$700,000.00	\$545,797.43	22.0%
Sub-total : General Revenues	(\$8,651,892.55)	(\$15,676,512.52)	(\$60,420,039.80)	(\$44,743,527.28)	25.9%
<b>Total : INCOME</b>	(\$8,651,892.55)	(\$15,676,512.52)	(\$60,420,039.80)	(\$44,743,527.28)	25.9%
<b>EXPENSES</b>					
Instruction					
Regular Instruction (+)	\$2,634,181.69	\$3,829,797.69	\$16,714,563.02	\$12,884,765.33	22.9%
Bilingual Instruction (+)	\$244,391.76	\$363,809.45	\$1,528,617.85	\$1,164,808.40	23.8%
Vocational Education (+)	\$37,452.14	\$37,252.41	\$0.00	(\$37,252.41)	0.0%
Sub-total : Instruction	\$2,916,025.59	\$4,230,859.55	\$18,243,180.87	\$14,012,321.32	23.2%
SPED Instruction					
Special Education Instruction (+)	\$1,116,732.47	\$1,502,391.03	\$7,713,968.23	\$6,211,577.20	19.5%
Sub-total : SPED Instruction	\$1,116,732.47	\$1,502,391.03	\$7,713,968.23	\$6,211,577.20	19.5%
SPED Support Services-Students					
Special Education Support Service (+)	\$257,736.18	\$352,992.07	\$1,522,673.75	\$1,169,681.68	23.2%
Sub-total : SPED Support Services-Students	\$257,736.18	\$352,992.07	\$1,522,673.75	\$1,169,681.68	23.2%
Support Services-Instruction					
Support Services (+)	\$2,557.30	\$29,370.27	\$320,949.52	\$291,579.25	9.2%
Library Services (+)	\$0.00	\$0.00	\$1,000.00	\$1,000.00	0.0%
In-Service (+)	\$2,403.81	\$32,756.67	\$11,592.80	(\$21,163.87)	282.6%
Assessment/Test Support (+)	\$7,510.00	\$22,178.22	\$75,310.40	\$53,132.18	29.4%
Curriculum Support (+)	\$125,101.36	\$223,514.66	\$553,715.60	\$330,200.94	40.4%
Technology Support (+)	\$1,570,817.66	\$2,433,735.12	\$8,910,358.06	\$6,476,622.94	27.3%
Sub-total : Support Services-Instruction	\$1,708,390.13	\$2,741,554.94	\$9,872,926.38	\$7,131,371.44	27.8%
School Administration					
School Administration (+)	\$449,563.50	\$673,923.56	\$3,130,402.57	\$2,456,479.01	21.5%
Sub-total : School Administration	\$449,563.50	\$673,923.56	\$3,130,402.57	\$2,456,479.01	21.5%
School Administration Support Services					
School Admin Support (+)	\$264,158.18	\$358,453.49	\$1,363,214.42	\$1,004,760.93	26.3%
Sub-total : School Administration Support Services	\$264,158.18	\$358,453.49	\$1,363,214.42	\$1,004,760.93	26.3%
District Administration					
Superintendent's Office (+)	\$173,771.41	\$285,723.42	\$1,213,762.44	\$928,039.02	23.5%
Board of Education (+)	\$72,592.65	\$141,393.13	\$606,506.94	\$465,113.81	23.3%
Parent/Public Relation (+)	\$23,658.44	\$23,658.44	\$15,000.00	(\$8,658.44)	157.7%
Sub-total : District Administration	\$270,022.50	\$450,774.99	\$1,835,269.38	\$1,384,494.39	24.6%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-School Operating Only For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
District Administration Support Services					
District Administration (+)	\$216,377.24	\$817,873.36	\$1,686,619.44	\$868,746.08	48.5%
Human Resources (+)	\$122,572.67	\$201,199.91	\$825,344.57	\$624,144.66	24.4%
Sub-total : District Administration Support Services	<u>\$338,949.91</u>	<u>\$1,019,073.27</u>	<u>\$2,511,964.01</u>	<u>\$1,492,890.74</u>	40.6%
Operations & Maintenance of Plant					
Operations (+)	\$1,417,343.09	\$2,510,573.93	\$7,397,876.64	\$4,887,302.71	33.9%
Maintenance (+)	\$805,383.88	\$1,237,753.92	\$5,659,005.23	\$4,421,251.31	21.9%
Sub-total : Operations & Maintenance of Plant	<u>\$2,222,726.97</u>	<u>\$3,748,327.85</u>	<u>\$13,056,881.87</u>	<u>\$9,308,554.02</u>	28.7%
Student Activities					
Student Activity (+)	\$146,031.86	\$179,828.69	\$1,294,857.59	\$1,115,028.90	13.9%
Sub-total : Student Activities	<u>\$146,031.86</u>	<u>\$179,828.69</u>	<u>\$1,294,857.59</u>	<u>\$1,115,028.90</u>	13.9%
Total : EXPENSES	<u>\$9,690,337.29</u>	<u>\$15,258,179.44</u>	<u>\$60,545,339.07</u>	<u>\$45,287,159.63</u>	25.2%
OTHER					
Transfers Out					
Transfers between Funds-Out (+)	\$0.00	\$0.00	\$495,000.00	\$495,000.00	0.0%
Sub-total : Transfers Out	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$495,000.00</u>	<u>\$495,000.00</u>	0.0%
Earnings on Investments					
Earnings on Investments (-)	\$296.16	\$817.77	\$2,000.00	\$1,182.23	40.9%
Sub-total : Earnings on Investments	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>(\$2,000.00)</u>	<u>(\$1,182.23)</u>	40.9%
Total : OTHER	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>\$493,000.00</u>	<u>\$493,817.77</u>	0.2%
NET INCOME/LOSS	<u>\$1,038,148.58</u>	<u>(\$419,150.85)</u>	<u>\$618,299.27</u>	<u>\$1,037,450.12</u>	67.8%

End of Report

Northwest Arctic Borough School District

Statement of Activities-School Oper. by OBJ For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
<b>INCOME</b>					
General Revenues					
State Grants & Entitlements (-)	\$6,247,777.00	\$12,660,861.00	\$41,848,608.80	\$29,187,747.80	30.3%
Federal Grants & Entitlements (-)	\$0.00	\$0.00	\$6,858,607.00	\$6,858,607.00	0.0%
Borough Appropriations (-)	\$1,037,987.75	\$1,037,987.75	\$4,151,951.00	\$3,113,963.25	25.0%
E-Rate (-)	\$1,215,640.80	\$1,823,461.20	\$6,860,873.00	\$5,037,411.80	26.6%
Other (-)	\$150,783.16	\$155,020.34	\$702,000.00	\$546,979.66	22.1%
Sub-total : General Revenues	(\$8,652,188.71)	(\$15,677,330.29)	(\$60,422,039.80)	(\$44,744,709.51)	25.9%
<b>Total : INCOME</b>	(\$8,652,188.71)	(\$15,677,330.29)	(\$60,422,039.80)	(\$44,744,709.51)	25.9%
<b>EXPENSES</b>					
SALARIES					
Certificated Salaries (+)	\$2,323,550.74	\$3,575,334.20	\$15,134,964.54	\$11,559,630.34	23.6%
Classified Salaries (+)	\$1,566,178.85	\$2,396,319.52	\$8,514,944.39	\$6,118,624.87	28.1%
Leave Pay Off (+)	\$30,007.83	\$50,225.37	\$200,000.00	\$149,774.63	25.1%
GTL Payroll Sweep (+)	\$0.00	\$0.00	\$9,279.00	\$9,279.00	0.0%
Board Stipends (+)	\$10,750.00	\$22,500.00	\$80,000.00	\$57,500.00	28.1%
Non Cert-Extra Duty Contract (+)	\$1,750.00	\$2,100.00	\$69,840.00	\$67,740.00	3.0%
Sub-total : SALARIES	\$3,932,237.42	\$6,046,479.09	\$24,009,027.93	\$17,962,548.84	25.2%
BENEFITS					
Control Acct - Benefits (+)	\$0.00	\$0.00	\$9,898.75	\$9,898.75	0.0%
Insurance-Health & Life (+)	\$1,290,047.73	\$1,811,416.80	\$6,786,509.57	\$4,975,092.77	26.7%
Insurance-Unemployment (+)	\$9,767.09	\$14,969.70	\$59,967.40	\$44,997.70	25.0%
Insurance-Workers Comp (+)	\$26,854.98	\$42,443.06	\$159,025.00	\$116,581.94	26.7%
Retirement-Fica & Medicare (+)	\$71,380.13	\$108,261.96	\$383,603.57	\$275,341.61	28.2%
Retirement-TRS (+)	\$277,504.67	\$430,460.78	\$1,797,540.57	\$1,367,079.79	23.9%
Retirement-PERS (+)	\$295,181.75	\$462,402.63	\$1,684,303.91	\$1,221,901.28	27.5%
On Behalf Exp-PERS (+)	\$0.00	\$0.00	\$3,191,941.90	\$3,191,941.90	0.0%
On Behalf Exp-TRS (+)	\$0.00	\$0.00	\$611,444.14	\$611,444.14	0.0%
Other Employee Benefits (+)	\$28,262.79	\$41,826.21	\$55,000.00	\$13,173.79	76.0%
Sub-total : BENEFITS	\$1,998,999.14	\$2,911,781.14	\$14,739,234.81	\$11,827,453.67	19.8%
PROFESSIONAL & TECHNICAL SERVICES					
Prof & Technical Services (+)	\$396,506.63	\$447,055.92	\$3,068,280.24	\$2,621,224.32	14.6%
Auditing & Accounting Services (+)	\$34,084.07	\$47,866.57	\$76,000.00	\$28,133.43	63.0%
Legal Services (+)	\$33,061.79	\$33,061.79	\$130,000.00	\$96,938.21	25.4%
Sub-total : PROFESSIONAL & TECHNICAL SERVICES	\$463,652.49	\$527,984.28	\$3,274,280.24	\$2,746,295.96	16.1%
TRAVEL					
Staff Travel (+)	\$58,659.00	\$110,645.85	\$592,137.68	\$481,491.83	18.7%
Student Travel (+)	\$94,897.56	\$99,080.06	\$711,198.32	\$612,118.26	13.9%
Sub-total : TRAVEL	\$153,556.56	\$209,725.91	\$1,303,336.00	\$1,093,610.09	16.1%
UTILITIES					
Water & Sewer (+)	\$76,126.76	\$126,714.09	\$442,389.80	\$315,675.71	28.6%
Garbage (+)	\$11,944.00	\$14,153.50	\$98,900.00	\$84,746.50	14.3%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-School Oper. by OBJ For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Communications (+)	\$21,939.14	\$30,092.83	\$130,500.00	\$100,407.17	23.1%
Other Utilities-Internet (+)	\$1,351,162.00	\$2,026,743.00	\$7,671,192.00	\$5,644,449.00	26.4%
Electricity (+)	\$295,123.56	\$392,166.87	\$2,030,195.00	\$1,638,028.13	19.3%
Heating Fuels (+)	\$474,546.69	\$846,270.61	\$1,990,000.00	\$1,143,729.39	42.5%
Sub-total : UTILITIES	<u>\$2,230,842.15</u>	<u>\$3,436,140.90</u>	<u>\$12,363,176.80</u>	<u>\$8,927,035.90</u>	27.8%
<b>OTHER PURCHASED SERVICES</b>					
Other Purchase Services (+)	\$600,672.44	\$629,388.67	\$2,408,430.00	\$1,779,041.33	26.1%
Sub-total : OTHER PURCHASED SERVICES	<u>\$600,672.44</u>	<u>\$629,388.67</u>	<u>\$2,408,430.00</u>	<u>\$1,779,041.33</u>	26.1%
<b>INSURANCE</b>					
Insurance & Bond Premiums (+)	\$1,518.40	\$582,395.10	\$583,875.84	\$1,480.74	99.7%
Liability Insurance (+)	\$0.00	\$370,648.50	\$369,799.45	(\$849.05)	100.2%
Sub-total : INSURANCE	<u>\$1,518.40</u>	<u>\$953,043.60</u>	<u>\$953,675.29</u>	<u>\$631.69</u>	99.9%
<b>SUPPLY</b>					
Supplies, Materials, Media (+)	\$209,875.57	\$361,419.68	\$1,175,979.00	\$814,559.32	30.7%
Gas/Oil-Vehicle & Equipment Supplies (+)	\$9,507.63	\$12,074.51	\$75,000.00	\$62,925.49	16.1%
Textbooks (+)	\$87,619.39	\$146,560.66	\$241,490.00	\$94,929.34	60.7%
Sub-total : SUPPLY	<u>\$307,002.59</u>	<u>\$520,054.85</u>	<u>\$1,492,469.00</u>	<u>\$972,414.15</u>	34.8%
<b>TUITION &amp; STIPENDS</b>					
Tuition & Stipends (+)	\$3,405.00	\$3,465.00	\$34,000.00	\$30,535.00	10.2%
Sub-total : TUITION & STIPENDS	<u>\$3,405.00</u>	<u>\$3,465.00</u>	<u>\$34,000.00</u>	<u>\$30,535.00</u>	10.2%
<b>OTHER</b>					
Other Expenses (+)	\$36,008.59	\$57,673.49	\$139,959.00	\$82,285.51	41.2%
Sub-total : OTHER	<u>\$36,008.59</u>	<u>\$57,673.49</u>	<u>\$139,959.00</u>	<u>\$82,285.51</u>	41.2%
<b>INDIRECT COSTS</b>					
Indirect Costs To/From (+)	(\$53,921.29)	(\$53,921.29)	(\$225,000.00)	(\$171,078.71)	24.0%
Sub-total : INDIRECT COSTS	<u>(\$53,921.29)</u>	<u>(\$53,921.29)</u>	<u>(\$225,000.00)</u>	<u>(\$171,078.71)</u>	24.0%
<b>CAPITAL EXPENDITURES</b>					
Equipment (+)	\$16,363.80	\$16,363.80	\$52,750.00	\$36,386.20	31.0%
Sub-total : CAPITAL EXPENDITURES	<u>\$16,363.80</u>	<u>\$16,363.80</u>	<u>\$52,750.00</u>	<u>\$36,386.20</u>	31.0%
Total : EXPENSES	<u>\$9,690,337.29</u>	<u>\$15,258,179.44</u>	<u>\$60,545,339.07</u>	<u>\$45,287,159.63</u>	25.2%
<b>OTHER</b>					
Transfers Out					
Transfers between Funds-Out (+)	\$0.00	\$0.00	\$495,000.00	\$495,000.00	0.0%
Sub-total : Transfers Out	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$495,000.00</u>	<u>\$495,000.00</u>	0.0%
Earnings on Investments					
Earnings on Investments (-)	\$296.16	\$817.77	\$2,000.00	\$1,182.23	40.9%
Sub-total : Earnings on Investments	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>(\$2,000.00)</u>	<u>(\$1,182.23)</u>	40.9%
Total : OTHER	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>\$493,000.00</u>	<u>\$493,817.77</u>	0.2%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-School Oper. by OBJ For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

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	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
NET INCOME/LOSS	\$1,037,852.42	(\$419,968.62)	\$616,299.27	\$1,036,267.89	68.1%

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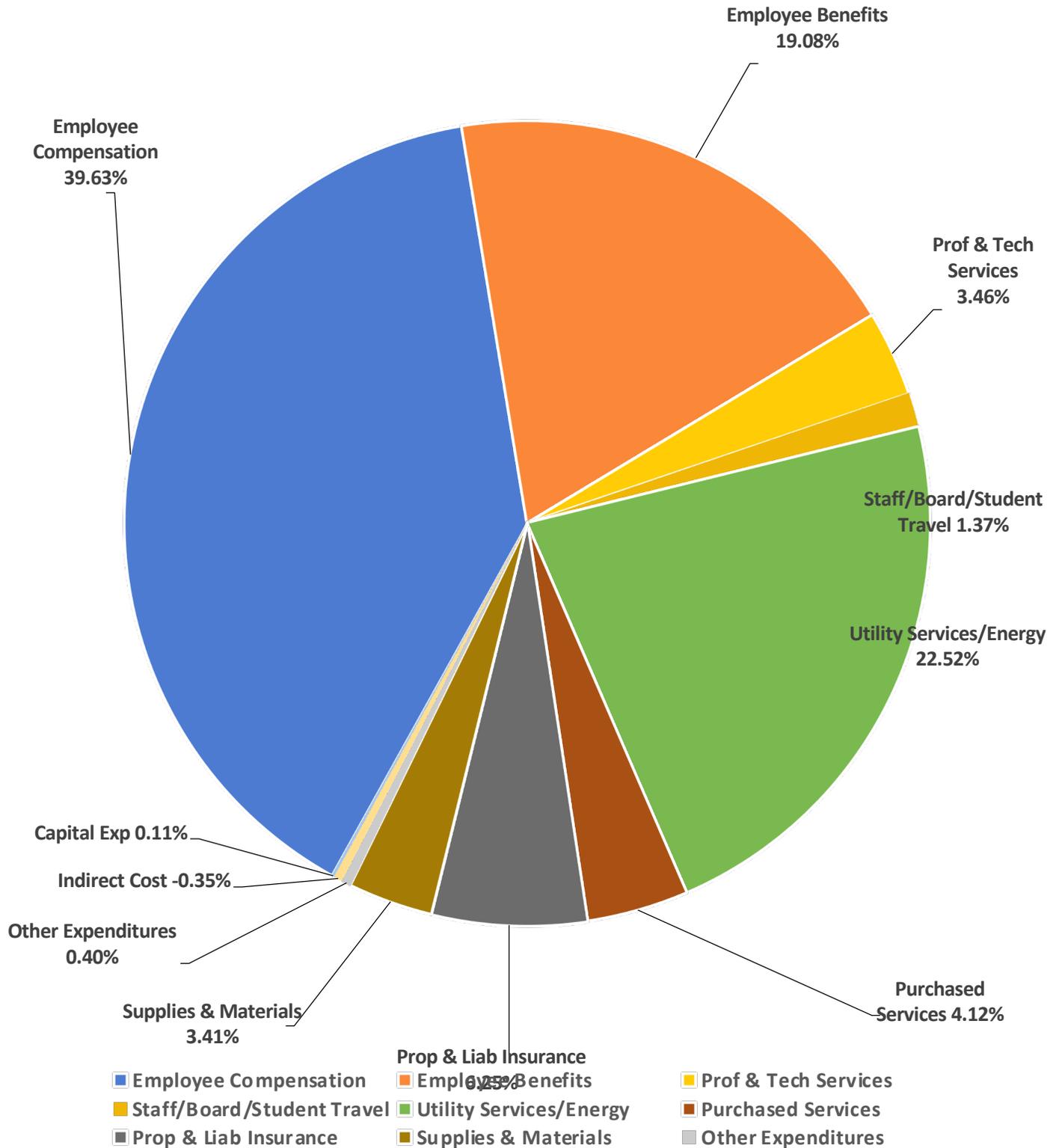
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End of Report

# Operating Fund Only

## Budget Expended by Object

(as of 10.31.2021) \$15,258,179.44



Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS: For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
<b>INCOME</b>					
Program Revenues					
Operations & Maintenance of Plant (-)	\$140,053.67	\$212,603.60	\$750,000.00	\$537,396.40	28.3%
Food Services (-)	\$926.30	\$2,432.61	\$56,000.00	\$53,567.39	4.3%
Sub-total : Program Revenues	(\$140,979.97)	(\$215,036.21)	(\$806,000.00)	(\$590,963.79)	26.7%
General Revenues					
Borough Appropriations (-)	\$1,037,987.75	\$1,037,987.75	\$4,151,951.00	\$3,113,963.25	25.0%
Earnings on Investment (-)	\$661.95	\$2,082.44	\$2,000.00	(\$82.44)	104.1%
Other (-)	\$313,557.40	\$586,613.17	\$1,028,728.54	\$442,115.37	57.0%
E-Rate (-)	\$1,215,640.80	\$1,823,461.20	\$6,860,873.00	\$5,037,411.80	26.6%
State Grants & Entitlements (-)	\$6,295,836.93	\$12,789,875.18	\$43,710,925.62	\$30,921,050.44	29.3%
Federal Grants & Entitlements (-)	\$1,192,752.98	\$1,298,367.38	\$22,815,395.86	\$21,517,028.48	5.7%
Sub-total : General Revenues	(\$10,056,437.81)	(\$17,538,387.12)	(\$78,569,874.02)	(\$61,031,486.90)	22.3%
<b>Total : INCOME</b>	(\$10,197,417.78)	(\$17,753,423.33)	(\$79,375,874.02)	(\$61,622,450.69)	22.4%
<b>EXPENSES</b>					
Instruction					
Regular Instruction (+)	\$3,216,056.69	\$4,646,292.23	\$21,233,127.04	\$16,586,834.81	21.9%
Bilingual Instruction (+)	\$244,391.76	\$372,051.14	\$1,741,906.87	\$1,369,855.73	21.4%
Vocational Education (+)	\$37,578.95	\$47,959.22	\$120,208.58	\$72,249.36	39.9%
Pre- Kindergarten (+)	\$13,055.54	\$18,780.18	\$0.00	(\$18,780.18)	0.0%
Sub-total : Instruction	\$3,511,082.94	\$5,085,082.77	\$23,095,242.49	\$18,010,159.72	22.0%
SPED Instruction					
Special Education Instruction (+)	\$1,116,732.47	\$1,502,391.03	\$7,713,968.23	\$6,211,577.20	19.5%
Sub-total : SPED Instruction	\$1,116,732.47	\$1,502,391.03	\$7,713,968.23	\$6,211,577.20	19.5%
SPED Support Services-Students					
Special Education Support Service (+)	\$366,303.22	\$496,321.32	\$2,250,788.91	\$1,754,467.59	22.1%
Sub-total : SPED Support Services-Students	\$366,303.22	\$496,321.32	\$2,250,788.91	\$1,754,467.59	22.1%
Support Services-Students					
Support Service-Student (+)	\$15,319.57	\$15,319.57	\$505,520.64	\$490,201.07	3.0%
Dormitory (+)	\$56,272.57	\$58,665.64	\$324,471.71	\$265,806.07	18.1%
Guidance/Career Services (+)	\$162,293.96	\$258,787.55	\$1,026,804.73	\$768,017.18	25.2%
Sub-total : Support Services-Students	\$233,886.10	\$332,772.76	\$1,856,797.08	\$1,524,024.32	17.9%
Support Services-Instruction					
Support Services (+)	\$175,998.79	\$584,451.59	\$2,602,268.01	\$2,017,816.42	22.5%
Library Services (+)	\$0.00	\$0.00	\$1,000.00	\$1,000.00	0.0%
In-Service (+)	\$2,403.81	\$32,756.67	\$11,592.80	(\$21,163.87)	282.6%
Assessment/Test Support (+)	\$7,510.00	\$22,178.22	\$75,310.40	\$53,132.18	29.4%
Curriculum Support (+)	\$125,101.36	\$223,514.66	\$1,753,715.60	\$1,530,200.94	12.7%
Technology Support (+)	\$1,762,305.30	\$2,664,320.76	\$9,338,988.06	\$6,674,667.30	28.5%
Sub-total : Support Services-Instruction	\$2,073,319.26	\$3,527,221.90	\$13,782,874.87	\$10,255,652.97	25.6%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS: For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
School Administration					
School Administration (+)	\$501,765.40	\$740,591.56	\$3,341,927.72	\$2,601,336.16	22.2%
Sub-total : School Administration	\$501,765.40	\$740,591.56	\$3,341,927.72	\$2,601,336.16	22.2%
School Administration Support Services					
School Admin Support (+)	\$305,151.87	\$423,858.62	\$1,710,856.53	\$1,286,997.91	24.8%
Sub-total : School Administration Support Services	\$305,151.87	\$423,858.62	\$1,710,856.53	\$1,286,997.91	24.8%
District Administration					
Superintendent's Office (+)	\$173,771.41	\$285,723.42	\$1,213,762.44	\$928,039.02	23.5%
Board of Education (+)	\$72,592.65	\$141,393.13	\$606,506.94	\$465,113.81	23.3%
Parent/Public Relation (+)	\$23,658.44	\$23,658.44	\$15,000.00	(\$8,658.44)	157.7%
Sub-total : District Administration	\$270,022.50	\$450,774.99	\$1,835,269.38	\$1,384,494.39	24.6%
District Administration Support Services					
District Administration (+)	\$300,291.22	\$923,272.38	\$2,424,588.31	\$1,501,315.93	38.1%
Human Resources (+)	\$122,572.67	\$201,199.91	\$825,344.57	\$624,144.66	24.4%
Administration Support-Other (+)	\$91,164.88	\$178,773.23	\$577,051.76	\$398,278.53	31.0%
Sub-total : District Administration Support Services	\$514,028.77	\$1,303,245.52	\$3,826,984.64	\$2,523,739.12	34.1%
Operations & Maintenance of Plant					
Operations (+)	\$1,502,788.08	\$2,644,863.78	\$7,932,346.42	\$5,287,482.64	33.3%
Maintenance (+)	\$881,402.41	\$1,404,326.27	\$6,459,287.56	\$5,054,961.29	21.7%
Sub-total : Operations & Maintenance of Plant	\$2,384,190.49	\$4,049,190.05	\$14,391,633.98	\$10,342,443.93	28.1%
Student Activities					
Student Activity (+)	\$183,896.30	\$217,893.13	\$1,294,857.59	\$1,076,964.46	16.8%
Sub-total : Student Activities	\$183,896.30	\$217,893.13	\$1,294,857.59	\$1,076,964.46	16.8%
Student Transportation					
Student Transportation (+)	\$4,907.81	\$7,900.38	\$97,407.00	\$89,506.62	8.1%
Sub-total : Student Transportation	\$4,907.81	\$7,900.38	\$97,407.00	\$89,506.62	8.1%
Adult & Continuing Education Instruction					
Adult & Continuing Education (+)	\$22,915.71	\$26,562.61	\$567,328.79	\$540,766.18	4.7%
Sub-total : Adult & Continuing Education Instruction	\$22,915.71	\$26,562.61	\$567,328.79	\$540,766.18	4.7%
Food Services					
Food Services (+)	\$789,650.67	\$812,256.55	\$4,982,153.54	\$4,169,896.99	16.3%
Sub-total : Food Services	\$789,650.67	\$812,256.55	\$4,982,153.54	\$4,169,896.99	16.3%
Construction in Progress					
Administration (+)	\$1,595.00	\$1,595.00	\$41,196.51	\$39,601.51	3.9%
Design (+)	\$161,260.27	\$191,886.27	\$0.00	(\$191,886.27)	0.0%
Construction Management (+)	\$39,791.21	\$39,791.21	\$0.00	(\$39,791.21)	0.0%
Construction (+)	\$11,267,600.35	\$11,306,693.08	\$1,615,193.22	(\$9,691,499.86)	700.0%
Percent for Art (+)	\$0.00	\$21,090.00	\$0.00	(\$21,090.00)	0.0%
CIP Construction Management-Consultant (+)	\$22,473.35	\$31,064.56	\$0.00	(\$31,064.56)	0.0%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS: For the Period 09/01/2021 through 10/31/2021

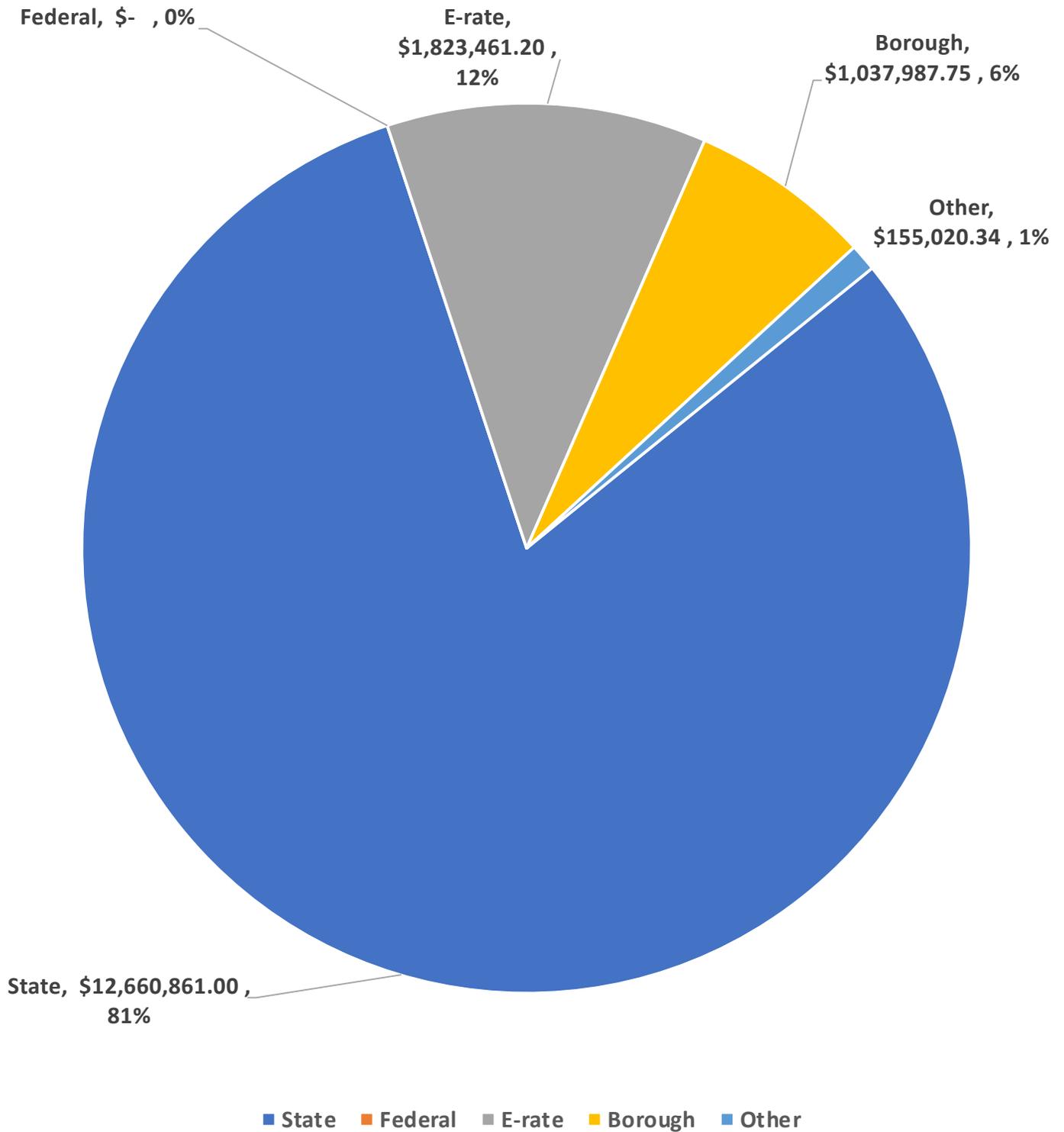
Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Sub-total : Construction in Progress	\$11,492,720.18	\$11,592,120.12	\$1,656,389.73	(\$9,935,730.39)	699.8%
Total : EXPENSES	\$23,770,573.69	\$30,568,183.31	\$82,404,480.48	\$51,836,297.17	37.1%
OTHER					
Transfers In					
Transfers Between Funds -In (-)	\$0.00	\$0.00	\$2,905,307.19	\$2,905,307.19	0.0%
Sub-total : Transfers In	\$0.00	\$0.00	(\$2,905,307.19)	(\$2,905,307.19)	0.0%
Transfers Out					
Transfers between Funds-Out (+)	\$0.00	\$0.00	\$495,000.00	\$495,000.00	0.0%
Sub-total : Transfers Out	\$0.00	\$0.00	\$495,000.00	\$495,000.00	0.0%
Earnings on Investments					
Earnings on Investments (-)	\$296.16	\$817.77	\$2,000.00	\$1,182.23	40.9%
Sub-total : Earnings on Investments	(\$296.16)	(\$817.77)	(\$2,000.00)	(\$1,182.23)	40.9%
Total : OTHER	(\$296.16)	(\$817.77)	(\$2,412,307.19)	(\$2,411,489.42)	0.0%
NET INCOME/LOSS	\$13,572,859.75	\$12,813,942.21	\$616,299.27	(\$12,197,642.94)	2079.2%

End of Report

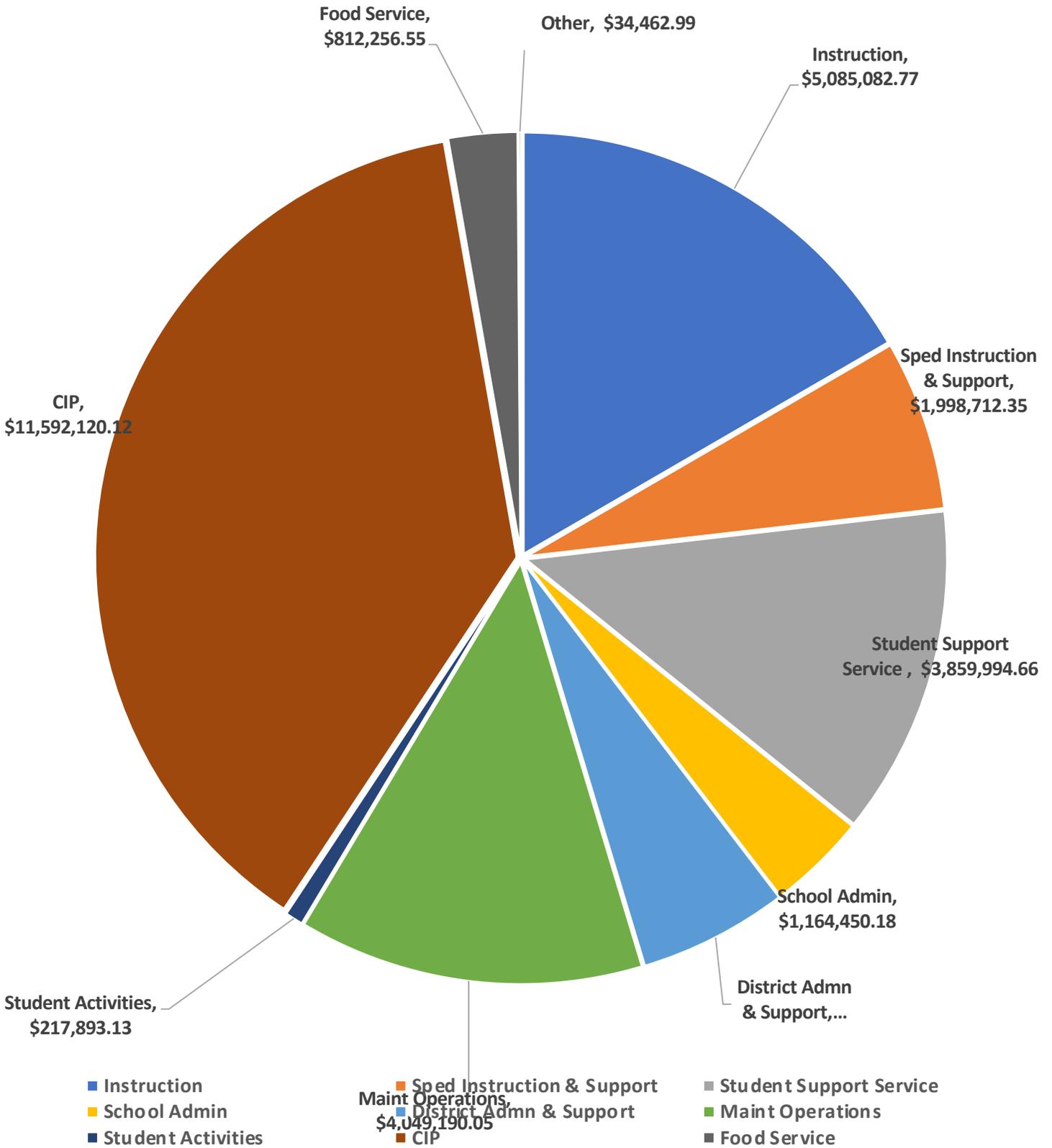
# Revenues – All Funds

(as of 10.31.2021) \$15,677,330.29



# Expenditures – All Funds

(as of 10.31.2021) \$30,568,183.31



Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS by OBJ: For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
<b>INCOME</b>					
Program Revenues					
Operations & Maintenance of Plant (-)	\$140,053.67	\$212,603.60	\$750,000.00	\$537,396.40	28.3%
Food Services (-)	\$926.30	\$2,432.61	\$56,000.00	\$53,567.39	4.3%
Sub-total : Program Revenues	(\$140,979.97)	(\$215,036.21)	(\$806,000.00)	(\$590,963.79)	26.7%
General Revenues					
State Grants & Entitlements (-)	\$6,295,836.93	\$12,789,875.18	\$43,710,925.62	\$30,921,050.44	29.3%
Federal Grants & Entitlements (-)	\$1,192,752.98	\$1,298,367.38	\$22,815,395.86	\$21,517,028.48	5.7%
Borough Appropriations (-)	\$1,037,987.75	\$1,037,987.75	\$4,151,951.00	\$3,113,963.25	25.0%
E-Rate (-)	\$1,215,640.80	\$1,823,461.20	\$6,860,873.00	\$5,037,411.80	26.6%
Other (-)	\$314,219.35	\$588,695.61	\$1,030,728.54	\$442,032.93	57.1%
Sub-total : General Revenues	(\$10,056,437.81)	(\$17,538,387.12)	(\$78,569,874.02)	(\$61,031,486.90)	22.3%
<b>Total : INCOME</b>	(\$10,197,417.78)	(\$17,753,423.33)	(\$79,375,874.02)	(\$61,622,450.69)	22.4%
<b>EXPENSES</b>					
SALARIES					
Certificated Salaries (+)	\$2,723,211.92	\$4,230,683.17	\$18,498,169.68	\$14,267,486.51	22.9%
Classified Salaries (+)	\$1,862,660.62	\$2,836,775.61	\$10,607,593.25	\$7,770,817.64	26.7%
Leave Pay Off (+)	\$34,461.98	\$60,035.03	\$209,710.55	\$149,675.52	28.6%
GTL Payroll Sweep (+)	\$0.00	\$0.00	\$9,279.00	\$9,279.00	0.0%
Board Stipends (+)	\$10,750.00	\$230,750.00	\$307,500.00	\$76,750.00	75.0%
Non Cert-Extra Duty Contract (+)	\$4,250.00	\$7,907.85	\$112,147.85	\$104,240.00	7.1%
Sub-total : SALARIES	\$4,635,334.52	\$7,366,151.66	\$29,744,400.33	\$22,378,248.67	24.8%
BENEFITS					
Control Acct - Benefits (+)	\$0.00	\$0.00	\$2,711,602.30	\$2,711,602.30	0.0%
Insurance-Health & Life (+)	\$1,532,171.50	\$2,142,093.85	\$6,811,709.57	\$4,669,615.72	31.4%
Insurance-Unemployment (+)	\$11,673.09	\$18,513.49	\$60,223.02	\$41,709.53	30.7%
Insurance-Workers Comp (+)	\$31,795.65	\$52,374.50	\$162,088.24	\$109,713.74	32.3%
Retirement-Fica & Medicare (+)	\$83,594.96	\$129,723.78	\$383,794.57	\$254,070.79	33.8%
Retirement-TRS (+)	\$328,048.58	\$513,119.04	\$1,797,540.57	\$1,284,421.53	28.5%
Retirement-PERS (+)	\$359,142.60	\$558,037.88	\$1,698,095.36	\$1,140,057.48	32.9%
On Behalf Exp-PERS (+)	\$0.00	\$0.00	\$3,191,941.90	\$3,191,941.90	0.0%
On Behalf Exp-TRS (+)	\$0.00	\$0.00	\$611,444.14	\$611,444.14	0.0%
Housing Allowance/Subsidy (+)	\$66,450.00	\$98,950.00	\$330,000.00	\$231,050.00	30.0%
Other Employee Benefits (+)	\$28,262.79	\$41,826.21	\$55,000.00	\$13,173.79	76.0%
Sub-total : BENEFITS	\$2,441,139.17	\$3,554,638.75	\$17,813,439.67	\$14,258,800.92	20.0%
PROFESSIONAL & TECHNICAL SERVICES					
Prof & Technical Services (+)	\$1,433,018.22	\$1,630,576.81	\$9,056,400.32	\$7,425,823.51	18.0%
Auditing & Accounting Services (+)	\$34,084.07	\$47,866.57	\$76,000.00	\$28,133.43	63.0%
Legal Services (+)	\$33,061.79	\$33,061.79	\$130,000.00	\$96,938.21	25.4%
Sub-total : PROFESSIONAL & TECHNICAL SERVICES	\$1,500,164.08	\$1,711,505.17	\$9,262,400.32	\$7,550,895.15	18.5%
TRAVEL					

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS by OBJ: For the Period 09/01/2021 through 10/31/2021

Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Staff Travel (+)	\$80,913.01	\$150,383.59	\$1,071,386.50	\$921,002.91	14.0%
Student Travel (+)	\$108,201.97	\$125,692.70	\$989,875.03	\$864,182.33	12.7%
Sub-total : TRAVEL	<u>\$189,114.98</u>	<u>\$276,076.29</u>	<u>\$2,061,261.53</u>	<u>\$1,785,185.24</u>	13.4%
<b>UTILITIES</b>					
Water & Sewer (+)	\$95,551.05	\$155,086.82	\$531,612.60	\$376,525.78	29.2%
Garbage (+)	\$13,095.37	\$15,691.81	\$99,286.94	\$83,595.13	15.8%
Communications (+)	\$22,714.87	\$31,259.83	\$140,162.64	\$108,902.81	22.3%
Other Utilities-Internet (+)	\$1,351,162.00	\$2,026,743.00	\$7,671,192.00	\$5,644,449.00	26.4%
Electricity (+)	\$336,255.32	\$444,587.14	\$2,325,374.96	\$1,880,787.82	19.1%
Heating Fuels (+)	\$480,112.60	\$853,828.89	\$2,031,992.37	\$1,178,163.48	42.0%
Sub-total : UTILITIES	<u>\$2,298,891.21</u>	<u>\$3,527,197.49</u>	<u>\$12,799,621.51</u>	<u>\$9,272,424.02</u>	27.6%
<b>OTHER PURCHASED SERVICES</b>					
Other Purchase Services (+)	\$622,149.72	\$676,785.66	\$2,532,334.79	\$1,855,549.13	26.7%
Sub-total : OTHER PURCHASED SERVICES	<u>\$622,149.72</u>	<u>\$676,785.66</u>	<u>\$2,532,334.79</u>	<u>\$1,855,549.13</u>	26.7%
<b>INSURANCE</b>					
Insurance & Bond Premiums (+)	\$1,518.40	\$582,395.10	\$583,875.84	\$1,480.74	99.7%
Liability Insurance (+)	\$0.00	\$370,648.50	\$369,799.45	(\$849.05)	100.2%
Sub-total : INSURANCE	<u>\$1,518.40</u>	<u>\$953,043.60</u>	<u>\$953,675.29</u>	<u>\$631.69</u>	99.9%
<b>SUPPLY</b>					
Supplies, Materials, Media (+)	\$597,009.92	\$885,935.06	\$3,089,636.34	\$2,203,701.28	28.7%
Gas/Oil-Vehicle & Equipment Supplies (+)	\$9,507.63	\$12,074.51	\$75,000.00	\$62,925.49	16.1%
Food Supplies (+)	\$40,658.95	\$43,323.83	\$85,814.88	\$42,491.05	50.5%
Textbooks (+)	\$87,619.39	\$146,560.66	\$1,441,490.00	\$1,294,929.34	10.2%
Sub-total : SUPPLY	<u>\$734,795.89</u>	<u>\$1,087,894.06</u>	<u>\$4,691,941.22</u>	<u>\$3,604,047.16</u>	23.2%
<b>TUITION &amp; STIPENDS</b>					
Tuition & Stipends (+)	\$11,486.00	\$11,546.00	\$82,650.00	\$71,104.00	14.0%
Scholarship Stipends (+)	\$1,000.00	\$2,000.00	\$15,000.00	\$13,000.00	13.3%
Sub-total : TUITION & STIPENDS	<u>\$12,486.00</u>	<u>\$13,546.00</u>	<u>\$97,650.00</u>	<u>\$84,104.00</u>	13.9%
<b>OTHER</b>					
Other Expenses (+)	\$41,908.72	\$68,989.93	\$160,029.00	\$91,039.07	43.1%
Dues & Fees (+)	\$158.36	\$349.33	\$190.97	(\$158.36)	182.9%
Sub-total : OTHER	<u>\$42,067.08</u>	<u>\$69,339.26</u>	<u>\$160,219.97</u>	<u>\$90,880.71</u>	43.3%
<b>INDIRECT COSTS</b>					
Indirect Costs To/From (+)	\$0.00	\$0.00	\$339,130.63	\$339,130.63	0.0%
Sub-total : INDIRECT COSTS	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$339,130.63</u>	<u>\$339,130.63</u>	0.0%
<b>CAPITAL EXPENDITURES</b>					
Equipment (+)	\$41,679.80	\$41,679.80	\$117,780.00	\$76,100.20	35.4%
New Building/Purchases (+)	\$11,086,438.85	\$11,124,381.49	\$918,388.00	(\$10,205,993.49)	1211.3%
Other Capital Outlay (+)	\$0.00	\$0.00	\$175,000.00	\$175,000.00	0.0%
Contingency (+)	\$0.00	\$0.00	\$26,000.00	\$26,000.00	0.0%
New Construction/ Rehab (+)	\$164,793.99	\$165,944.08	\$670,805.22	\$504,861.14	24.7%

Operating Statement with Budget

Northwest Arctic Borough School District

Statement of Activities-ALL FUNDS by OBJ: For the Period 09/01/2021 through 10/31/2021

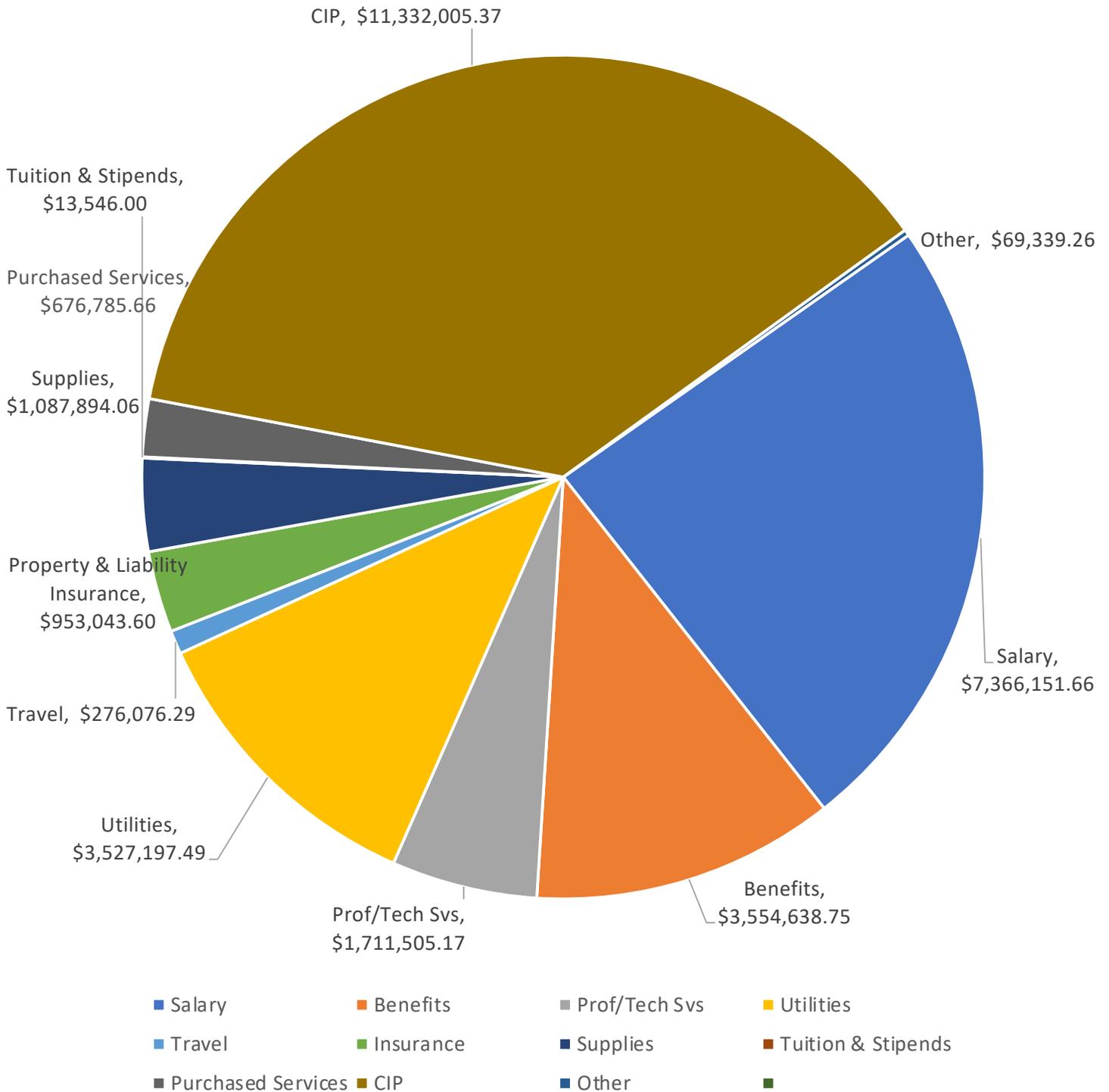
Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Related Soft Costs (+)	\$0.00	\$0.00	\$40,432.00	\$40,432.00	0.0%
Sub-total : CAPITAL EXPENDITURES	<u>\$11,292,912.64</u>	<u>\$11,332,005.37</u>	<u>\$1,948,405.22</u>	<u>(\$9,383,600.15)</u>	581.6%
Total : EXPENSES	<u>\$23,770,573.69</u>	<u>\$30,568,183.31</u>	<u>\$82,404,480.48</u>	<u>\$51,836,297.17</u>	37.1%
OTHER					
Transfers In					
Transfers Between Funds -In (-)	\$0.00	\$0.00	\$2,905,307.19	\$2,905,307.19	0.0%
Sub-total : Transfers In	<u>\$0.00</u>	<u>\$0.00</u>	<u>(\$2,905,307.19)</u>	<u>(\$2,905,307.19)</u>	0.0%
Transfers Out					
Transfers between Funds-Out (+)	\$0.00	\$0.00	\$495,000.00	\$495,000.00	0.0%
Sub-total : Transfers Out	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$495,000.00</u>	<u>\$495,000.00</u>	0.0%
Earnings on Investments					
Earnings on Investments (-)	\$296.16	\$817.77	\$2,000.00	\$1,182.23	40.9%
Sub-total : Earnings on Investments	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>(\$2,000.00)</u>	<u>(\$1,182.23)</u>	40.9%
Total : OTHER	<u>(\$296.16)</u>	<u>(\$817.77)</u>	<u>(\$2,412,307.19)</u>	<u>(\$2,411,489.42)</u>	0.0%
NET INCOME/LOSS	<u>\$13,572,859.75</u>	<u>\$12,813,942.21</u>	<u>\$616,299.27</u>	<u>(\$12,197,642.94)</u>	2079.2%

End of Report

# Expenditures by Object – All Funds

(In Millions as of 10.31.2021) \$30,568,183.31



Northwest Arctic Borough School District

Statement of Activities-Board by OBJ For the Period 09/01/2021 through 10/31/2021

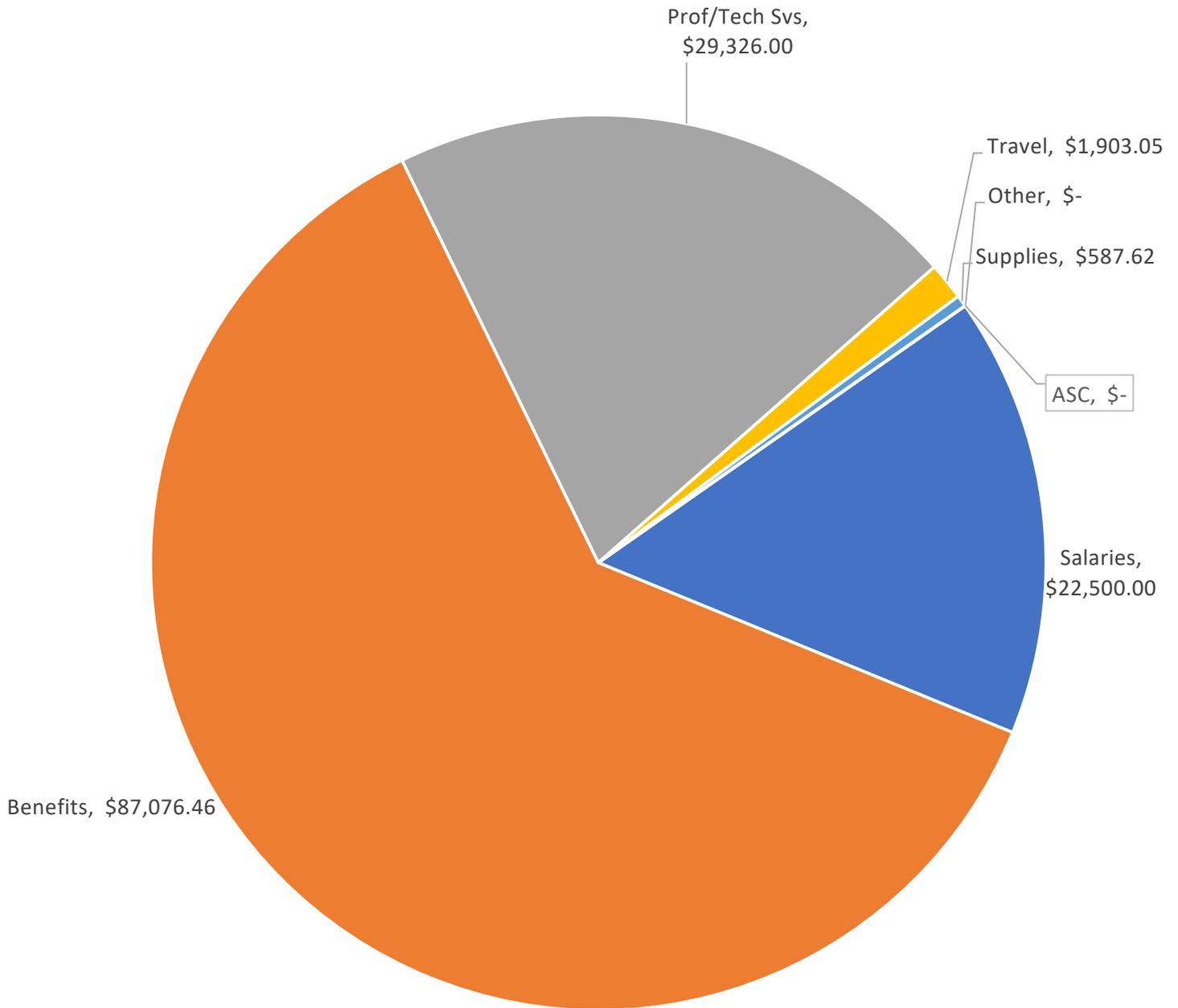
Fiscal Year: 2021-2022

	<u>09/01/2021 - 10/31/2021</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
<b>EXPENSES</b>					
<b>SALARIES</b>					
Board Stipends (+)	\$10,750.00	\$22,500.00	\$80,000.00	\$57,500.00	28.1%
Sub-total : SALARIES	\$10,750.00	\$22,500.00	\$80,000.00	\$57,500.00	28.1%
<b>BENEFITS</b>					
Insurance-Health & Life (+)	\$37,800.00	\$84,000.00	\$277,200.00	\$193,200.00	30.3%
Insurance-Unemployment (+)	\$2.07	\$2.07	\$1,066.41	\$1,064.34	0.2%
Insurance-Workers Comp (+)	\$61.49	\$128.68	\$2,026.19	\$1,897.51	6.4%
Retirement-Fica & Medicare (+)	\$620.86	\$1,240.71	\$5,154.34	\$3,913.63	24.1%
Retirement-PERS (+)	\$715.00	\$1,705.00	\$18,260.00	\$16,555.00	9.3%
Sub-total : BENEFITS	\$39,199.42	\$87,076.46	\$303,706.94	\$216,630.48	28.7%
<b>PROFESSIONAL &amp; TECHNICAL SERVICES</b>					
Prof & Technical Services (+)	\$20,201.00	\$29,326.00	\$125,500.00	\$96,174.00	23.4%
Sub-total : PROFESSIONAL & TECHNICAL SERVICES	\$20,201.00	\$29,326.00	\$125,500.00	\$96,174.00	23.4%
<b>TRAVEL</b>					
Staff Travel (+)	\$1,903.05	\$1,903.05	\$43,800.00	\$41,896.95	4.3%
Sub-total : TRAVEL	\$1,903.05	\$1,903.05	\$43,800.00	\$41,896.95	4.3%
<b>SUPPLY</b>					
Supplies, Materials, Media (+)	\$539.18	\$587.62	\$15,000.00	\$14,412.38	3.9%
Sub-total : SUPPLY	\$539.18	\$587.62	\$15,000.00	\$14,412.38	3.9%
<b>OTHER</b>					
Other Expenses (+)	\$0.00	\$0.00	\$38,500.00	\$38,500.00	0.0%
Sub-total : OTHER	\$0.00	\$0.00	\$38,500.00	\$38,500.00	0.0%
Total : EXPENSES	\$72,592.65	\$141,393.13	\$606,506.94	\$465,113.81	23.3%
<b>NET INCOME/LOSS</b>	<b>\$72,592.65</b>	<b>\$141,393.13</b>	<b>\$606,506.94</b>	<b>\$465,113.81</b>	<b>23.3%</b>

End of Report

# Board Expenditures

(as of 10.31.2021) \$141,393.13



■ Salaries ■ Benefits ■ Prof/Tech Svs ■ Travel ■ Supplies ■ Other ■ ASC

# Board Budget Summary

<b>100.099.511.000.333</b>	<b>Board Stipends</b>	<b>\$80,000</b>
	6 Regular Meetings	
	Board Retreat combined with Oct Meeting	
	Annual AASB Conference – November 4-7, 2021	
<b>100.099.511.000.36X</b>	<b>Payroll Benefits</b>	<b>\$303,706.94</b>
100.099.511.000.361	Insurance-Health & life - \$25,200 per member	\$277,200.00
100.099.511.000.362	Insurance-Unemployment .3%	\$1,066.41
100.099.511.000.363	Insurance-Workers Comp .57%	\$2,026.19
100.099.511.000.364	Retirement-FICA SS & Medicare-1.45% & 6.20%	\$5,154.34
100.099.511.000.366	Retirement-PERS-22%	\$18,260.00
<b>100.099.511.0XX.410</b>	<b>Professional &amp; Technical Services</b>	<b>\$125,500</b>
100.099.511.000.410	Miscellaneous Services and Training, AASB In-service Training	\$25,000
100.099.511.012.410	Lobbyists - J&H, JM Walsh Co.	\$89,500
100.099.511.013.410	Strategic Planning – Consulting - Evaluations	\$11,000
<b>100.099.511.000.42X</b>	<b>Travel &amp; Per Diem</b>	<b>\$43,800</b>
	6 Regular Meetings, half virtual	
	Board Retreat combined with October Board Meeting	
	Annual AASB Conference	

# Board Budget Summary, Continued

100.099.511.000.4XX	Miscellaneous Expenses	\$53,500
100.099.511.000.450	Supplies, Materials, Media-Supplies & Freight for Meetings	\$10,000
100.099.511.000.490	Other Expenses	\$38,500
	CEAAC Membership - \$18,000	
	AASB Fees - \$20,500	
100.099.511.015.XXX	Board Budget for joint Advisory School Council Retreat	\$5,000
100.099.511.000.XXX	TOTAL	\$606,506.94

## Dues & Membership Fees:

CEAAC- Represent Alaska school districts, organizations, and individuals through courts and legislative activity - concerned about the quality and breadth of educational opportunities available to Alaska's children.

AASB- Alaska School District advocacy at state and federal level. See attached Benefits.

# To Our Board Financial Summary

## Wellsfargo Investment Account Update:

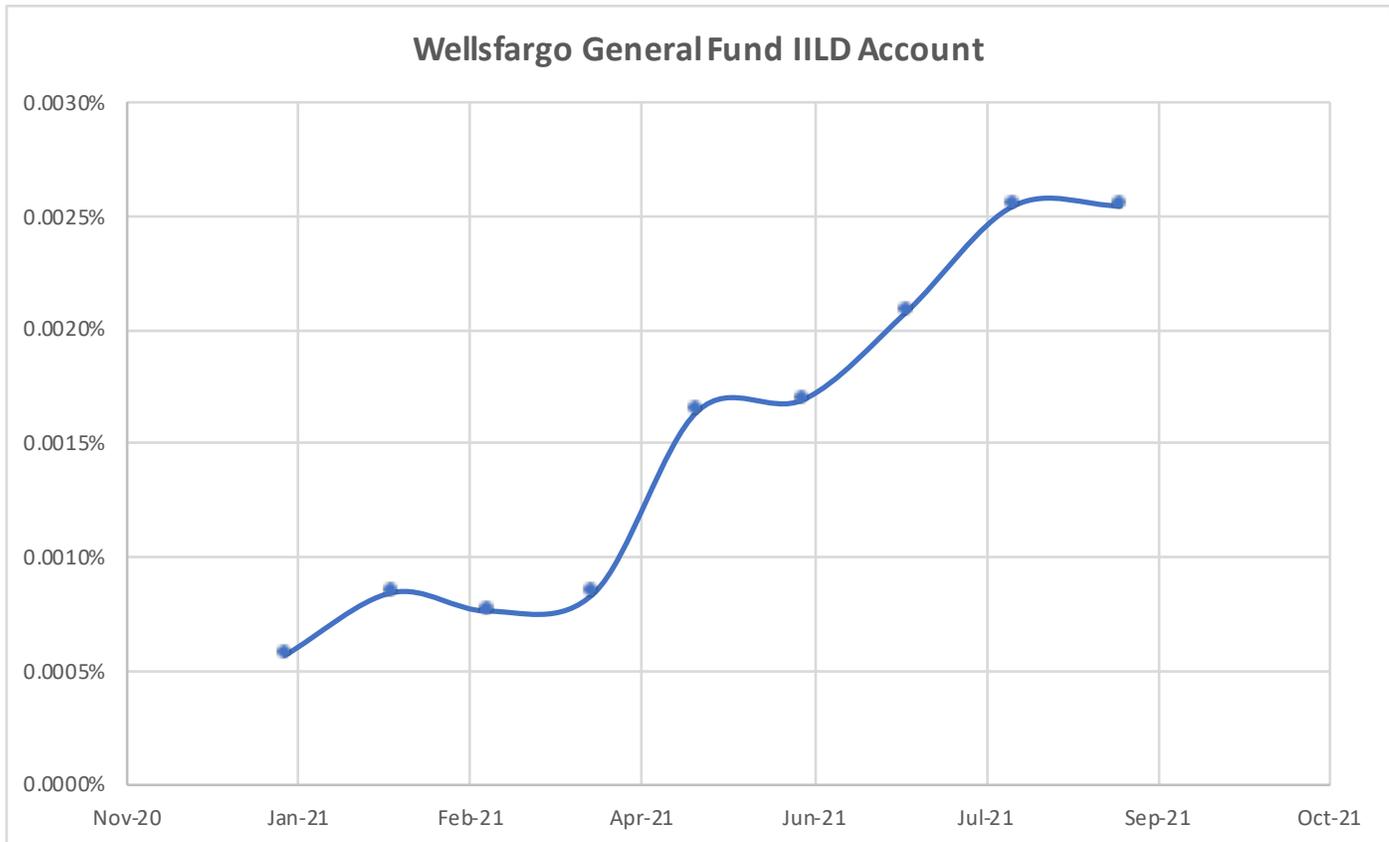
The accrued income on the principal holdings of the General Fund \$10,248,179.57 investment was \$8,249,862.94 as of October 31, 2021; an increase of \$452.46 from the August 3, 2021 report with a total of \$974.00 earned in FY22. \$2 Million was transferred out of this investment account in September to cover expenses over revenue in the general fund.

The accrued income on the principal holdings of the Capital Improvement Fund \$20M investment was \$10,003,828.78 as of October 31, 2021; an increase of \$562.13 from the August 31, 2021 report with a total of \$1,461.01 earned in FY22. A total of \$10 Million has been transferred out of this investment account to date to cover expenses over revenue on the Kivalina Project.

Our investment accounts are slowly starting to see a higher yield, we will keep the funds in the accounts as long as possible but will need to transfer money out of the accounts as expenditures exceed revenue.

*In March of 2019 we received the highest earnings on investment since deciding to invest funds, 2.0001% which totaled \$20,001.06 for that one month.*

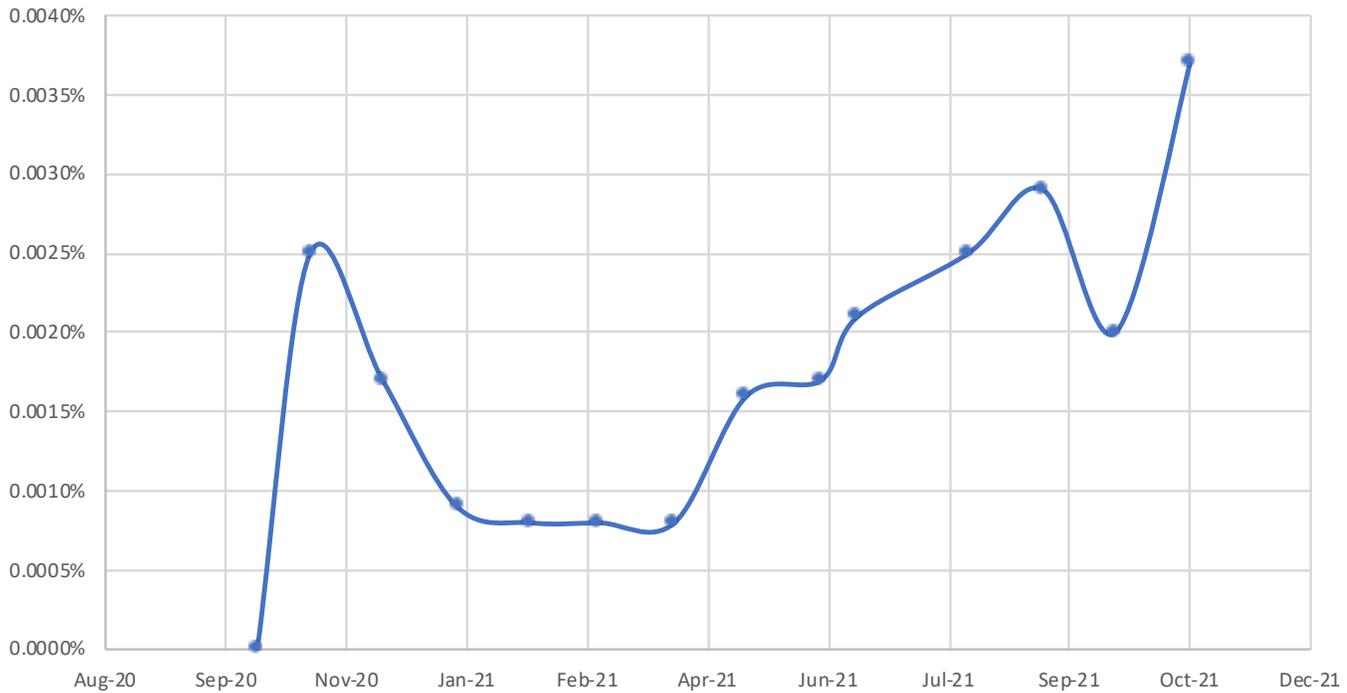
NWABSD IILD GF			Rate of
Statement	Account Balance	Monthly Increase	return
Dec-20	\$ 10,248,179.57	\$ -	0.0000%
Dec-20	\$ 10,248,238.09	\$ 58.52	0.0006%
Jan-21	\$ 10,248,324.74	\$ 86.65	0.0008%
Feb-21	\$ 10,248,403.12	\$ 78.38	0.0008%
Mar-21	\$ 10,248,489.77	\$ 86.65	0.0008%
Apr-21	\$ 10,248,658.11	\$ 168.34	0.0016%
May-21	\$ 10,248,831.83	\$ 173.72	0.0017%
Jun-21	\$ 10,249,045.17	\$ 213.34	0.0021%
Jul-21	\$ 10,249,305.99	\$ 260.82	0.0025%
Aug-21	\$ 10,249,566.78	\$ 260.79	0.0025%
Sep-21	\$ 8,249,566.78	\$ (2,000,000.00)	
Sep-21	\$ 8,249,723.08	\$ 156.30	0.0019%
Oct-21	\$ 8,249,862.94	\$ 296.16	0.0036%



**NWABSD IILD CIP**

Statement	Account Balance	Monthly Increase	Rate of return
Oct-20	\$ 20,000,000.00	\$ -	0.0000%
Oct-20	\$ 20,000,503.18	\$ 503.18	0.0025%
Nov-20	\$ 20,000,841.98	\$ 338.80	0.0017%
Dec-20	\$ 20,001,022.09	\$ 180.11	0.0009%
Jan-21	\$ 20,001,191.19	\$ 169.10	0.0008%
Feb-21	\$ 20,001,344.12	\$ 152.93	0.0008%
Mar-21	\$ 20,001,513.21	\$ 169.09	0.0008%
Apr-21	\$ 20,001,841.70	\$ 328.49	0.0016%
May-21	\$ 20,002,180.74	\$ 339.04	0.0017%
Jun-21	\$ 18,002,180.74	\$ (2,000,000.00)	
Jun-21	\$ 18,002,564.11	\$ 383.37	0.0021%
Jul-21	\$ 18,003,022.22	\$ 458.11	0.0025%
Aug-21	\$ 15,003,022.22	\$ (3,000,000.00)	
Aug-21	\$ 15,003,462.99	\$ 440.77	0.0029%
Sep-21	\$ 13,003,462.99	\$ (2,000,000.00)	
Sep-21	\$ 10,003,462.99	\$ (3,000,000.00)	
Sep-21	\$ 10,003,659.33	\$ 196.34	0.0020%
Oct-21	\$ 10,003,828.78	\$ 365.79	0.0037%

**Wellsfargo CIP IILD Account**



**Deposit Activities**

**INST INSURED LIQ DEPOSIT DEMAND A000MK3**  
 \*As of October 31, 2021

Transaction Date	Activity	Principal	Market Value (\$)	Interest Amount	Principal Balance
				Interest earned this period	
				169.45	
	<b>Beginning Balance</b>				<b>10,003,659.33</b>
10/29/21	Interest Rate 0.0219000%			169.45	10,003,828.78
	<b>Ending Balance</b>				<b>10,003,828.78</b>
<b>INST INSURED LIQ DEPOSIT SAVINGS A000MK6</b>					
*As of October 31, 2021					
				Interest earned this period	
				139.86	

Transaction Date	Activity	Principal	Market Value (\$)	Interest Amount	Principal Balance
	<b>Beginning Balance</b>				<b>8,249,723.08</b>
10/29/21	Interest Rate 0.0219000%			139.86	8,249,862.94
	<b>Ending Balance</b>				<b>8,249,862.94</b>

## FY21 General Fund Year End

**SUMMARY OF FUND BALANCE ON 6.30.2021**

	ACTUAL FUND BALANCE	FUND BALANCE WITH MORE PREPAID
<b>FY20 Year End Fund Balance</b>	<b>13,899,827</b>	<b>13,899,827</b>
<b>FY21 Total Revenue</b>	<b>53,506,153</b>	<b>53,506,153</b>
<b>FY21 Total Transfers In</b>	-	-
<b>FY21 Total Expenditures</b>	<b>54,874,892</b>	<b>54,874,892</b>
<b>FY21 Total Transfers Out</b>	<b>2,600,697</b>	<b>2,600,697</b>
Reserved:		
Inventory	765,422 Fuel Inventory	765,422 Fuel Inventory
Prepaid	25,034 MISC	1,157,010 Insurance & Misc
Impact Aid	452,580 FY21 Receipts	452,580 FY21 Receipts
<b>Total Reserved Fund Balance</b>	<b>1,243,036</b>	<b>2,375,012</b>
<b>Total Unreserved Fund Balance</b>	<b>8,687,355 15.83%</b>	<b>7,555,379 13.77%</b>

off by \$1 due to rounding

The Fund Balance with more prepaid shows what our year end fund balance would have been if we were able to prepay for Property & Liability insurance last spring before year end. I like to prepay for large expenses like that just so that those funds are reserved.

## FY21 General Fund Year End

Last Updated: 10/29/2021

	Budget	Revenue	Remaining
<b>Total Revenue</b>	<b>59,414,157</b>	<b>53,506,153</b>	<b>5,908,004</b>
Other Local Revenue & Interest	401,500	404,030	
Borough Contribution	4,140,049	4,140,049	
E-rate Program	6,731,273	6,808,765	
State Foundation	37,350,320	37,189,092	
TRS and PERS Onbehalf	3,637,501	3,551,712	
Impact Program	6,858,607	1,117,598	
Other Revenues - State Sources	294,908	294,908	

	Budget	Transfer In	Remaining
<b>Total Transfers In</b>	<b>2,261,023</b>	-	<b>2,261,023</b>
Transfer In from CIP	2,261,023	-	

	Budget	Expenditures	Remaining
<b>Total Expenditures</b>	<b>59,722,848</b>	<b>54,874,892</b>	<b>4,847,956</b>
Expenditures	59,722,848	54,874,892	

	Budget	Transfers Out	Remaining
<b>Total Transfers Out</b>	<b>1,952,332</b>	<b>2,600,697</b>	<b>(648,365)</b>
Transfers from General Fund to:			
Food Service	1,000,000	1,489,745	(489,745)
Alaska Technical Center	460,000	298,108	161,892
STAR	-	158,902	(158,902)
Student Transportation	42,332	32,359	9,973
COVID Fund	-	191,192	(191,192)
June Nelson Scholarship fund	-	4,422	(4,422)
Teacher Housing	450,000	425,969	24,031
	-	-	-

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### SUMMARY OF FUND BALANCE ON 6.30.2021

**FY20 Year End Fund Balance** **13,899,827**

**FY21 Total Revenue** **53,506,153**

**FY21 Total Transfers In** -

**FY21 Total Expenditures** **54,874,892**

**FY21 Total Transfers Out** **2,600,697**

Reserved:

Inventory	765,422	Fuel Inventory
Prepaid	25,034	Insurance & Misc
Impact Aid	452,580	FY21 Receipts

**Total Reserved Fund Balance** **1,243,036**

**Total Unreserved Fund Balance** **8,687,355** **15.83%**

off by \$1 due to rounding

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**Northwest Arctic Borough School District  
FY22 Budget**

	<u>FY22</u>	<u>FY22</u>	<u>Changes</u>
	<u>Current Budget</u>	<u>Revised Budget</u>	
<b><u>REVENUE</u></b>			
Other Local Revenue	\$700,000	\$600,000	(\$100,000)
Earnings on Investments	\$2,000	\$3,200	\$1,200
Donations/Contributions	\$0	\$0	\$0
Borough Appropriation	\$4,151,951	\$4,151,951	\$0
E-rate Program	\$6,860,873	\$6,860,873	\$0
State Foundation	\$37,660,081	\$37,462,908	(\$197,173)
Quality Schools & BAG	\$273,143	\$273,143	\$0
TRS On-behalf	\$3,191,942	\$3,191,942	\$0
PERS On-behalf	\$611,444	\$611,444	\$0
Revenue - Other State Sources	\$0	\$0	\$0
Impact Aid Program	\$6,858,607	\$6,858,607	(\$0)
<b>TOTAL REVENUES</b>	<b>\$60,310,041</b>	<b>\$60,014,068</b>	<b>(\$295,973)</b>
<b><u>TRANSFERS IN</u></b>			
District Technology Fund			
Locally Funded Maintenance CIP Fund			
Teacher housing CIP Fund			
Kivalina District Contribution			
NW Magnet School Expansion			
Magnet School Dormitory			
ATC Capital Reserve			
CIP Reserved Local Share			
<b>TOTAL TRANSFERS IN</b>	<b>\$0</b>	<b>\$0</b>	
<b><u>EXPENSES</u></b>			
Certificated Salaries	\$15,060,965	\$14,744,082	(\$316,883)
Non-Certificated Salaries	\$8,594,063	\$8,803,903	\$209,840
Leave Pay Out	\$200,000	\$219,832	\$19,832
Board Stipends	\$80,000	\$79,000	(\$1,000)
Employee Benefits	\$10,925,950	\$10,737,630	(\$188,320)
TRS On-behalf	\$3,191,942	\$3,191,942	\$0
PERS On-behalf	\$611,444	\$611,444	\$0
<b>SUBTOTAL: Personnel</b>	<b>\$38,664,364</b>	<b>\$38,387,833</b>	<b>(\$276,531)</b>
Professional & Technical Services	\$3,190,674	\$3,191,302	\$628
Staff Travel	\$548,338	\$531,348	(\$16,990)
Board Travel	\$43,800	\$89,379	\$45,579
Student Travel	\$711,198	\$729,316	\$18,118
Utility Services	\$8,342,982	\$8,342,599	(\$383)
Energy-includes electricity & fuel	\$4,020,195	\$4,032,395	\$12,200
Other Purchased Services	\$2,408,430	\$2,454,407	\$45,977
Property & Liability Insurance	\$953,675	\$953,044	(\$631)
Supplies, Materials & Media	\$1,436,380	\$1,461,071	\$24,691
Tuition	\$34,000	\$34,000	\$0
Dues & Fees	\$138,909	\$176,305	\$37,396

Inventoried Equipment	\$52,750	\$59,508	\$6,758
Indirect Cost Recovery	(\$225,000)	(\$300,000)	(\$75,000)
<b>SUBTOTAL: Non-Personnel</b>	<b>\$21,656,331</b>	<b>\$21,754,673</b>	<b>\$98,342</b>
<b>TOTAL EXPENSES</b>	<b>\$60,320,695</b>	<b>\$60,142,506</b>	
<b><u>TRANSFERS OUT</u></b>			
Food Service Fund	\$0	\$0	\$0
ATC	\$0	\$0	\$0
Star of the Northwest - Magnet School	\$0	\$0	\$0
Teacher Housing Fund	\$450,000	\$450,000	\$0
Special Revenue Fund	\$45,000	\$45,000	\$0
<b>TOTAL TRANSFERS OUT</b>	<b>\$495,000</b>	<b>\$495,000</b>	<b>\$0</b>

<b>INCREASE (DECREASE)-UNRESERVED FB</b>	<b>(\$505,654)</b>	<b>(\$623,438)</b>
<b>FY21 Unreserved Fund Balance</b>	<b>\$8,687,354</b>	<b>\$8,687,355</b>
<b>Projected Decrease in Fund Balance</b>	<b>\$8,181,700</b>	<b>\$8,063,917</b>

**Board Budget Summary**

**Board Stipends**

	Stipend	Days			
4 Regular meetings in person	\$ 250.00	11	4	2	\$ 22,000.00
4 Regular meetings via Teams	\$ 250.00	11	4	2	\$ 22,000.00
Board Retreat combined with October meeting	\$ 250.00	9		3	\$ 6,750.00
AASB Annual Conference November 4-7	\$ 250.00	10		4	\$ 10,000.00
<u>4 special meetings (Incl other board misc mtg)</u>	\$ 250.00	11	3	1	\$ 8,250.00
AASB 2 member regular mtgs	\$ 250.00	2	4		\$ 2,000.00
President-NWALT, CWT, ATC	\$ 250.00	3	4		\$ 3,000.00
Lobbying & other meetings	\$ 250.00	5	4	1	\$ 5,000.00
<b>TOTAL</b>					<b>\$ 79,000.00</b>

**Benefits**

Health Insurance	\$ 25,200.00	10			\$ 252,000.00
Other Benefits	\$ 79,000.00	13%			\$ 9,898.70
<b>TOTAL</b>					<b>\$ 261,898.70</b>

**Professional & Technical Services**

Misc. Serv and training, AASB Inservice					\$ 25,000.00
Lobbyists					\$ 89,500.00
Strategic Planning					\$ 11,000.00
<b>TOTAL</b>					<b>\$ 125,500.00</b>

**Travel & Perdiem**

Regular meeting Airfare - 5 members	\$ 2,241.00	4			\$ 9,044.00
Regular meeting Hotel - \$239.00 a night	\$ 1,195.00	4	3		\$ 14,240.00
Regular meeting Perdiem-\$80.00	\$ 80.00	5	4	3	\$ 4,800.00
					<b>\$ 28,084.00</b>

Annual AASB Airfare \$300.00	\$ 300.00	9			\$ 2,400.00
Annual AASB Village to OTZ					\$ 1,216.00
Annual AASB Hotel \$225.00	\$ 225.00	9	4		\$ 8,100.00
Annual AASB Car-actual costs					\$ 637.23
AASB Perdiem	\$ 80.00	9	4		\$ 3,440.00
					<b>\$ 15,793.23</b>

<u>AASB Quarterly Trainings-Mtg Fees</u>	\$ 250.00	11	2	1	\$ 5,500.00
AASB travel	\$ 330.00	11		1	\$ 3,630.00
Village to OTZ					\$ 2,241.00
AASB hotel @250.00	\$ 250.00	11	1	3	\$ 8,250.00
AASB Perdiem	\$ 80.00	11	1	2	\$ 1,760.00
					<b>\$ 21,381.00</b>

1 National Conference-Travel	\$ 1,000.00	11			\$ 11,000.00
Village to OTZ					\$ 2,231.00
Hotel @250.00	\$ 250.00	11	3		\$ 8,250.00
Perdiem	\$ 80.00	11	3		\$ 2,640.00
					<b>\$ 24,121.00</b>

**TOTAL \$ 89,379.23**

**Miscellaneous Exp**

Supplies, media and frt for Board & Board meeting	\$ 7,229.07				\$ 7,229.07
CEACC membership and aasb fees	\$ 38,500.00				\$ 38,500.00
Joint ASC meeting supplies (Teams meeting)	\$ 5,000.00				\$ 5,000.00
<b>TOTAL</b>					<b>\$ 50,729.07</b>

**Grand Total \$ 606,507.00**  
**FY22 Budget \$ 606,507.00**  
**Balance \$ -**

This revision is included in the FY22 Budget Revision #1.

## NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	Monthly Rate Charged per EE	NWAB Payments	Cost to District	Payment over Cost	
December, 2020	3,891.00	-	54,366.00		
January, 2021	3,141.00	290,079.14	59,662.00	Paid Dec & Jan together	
February, 2021	3,141.00	-	49,300.00		
March, 2021	3,141.00	268,038.72	75,748.00	Paid Feb & Mar together	
April, 2021	3,141.00	132,412.66	86,565.00		
May, 2021	3,141.00	135,678.76	68,641.00		
June, 2021	3,141.00	135,678.76	70,291.00		
July, 2021	3,141.00	243,045.60	55,614.00	Paid Jul & Aug together	
August, 2021	3,141.00	-	69,515.00		
September, 2021	1,804.62	-	60,440.00	Reduced billing	
October, 2021	1,804.62				
November, 2021	1,804.62				
		1,204,933.64	650,142.00	554,791.64	<i>Year to Date totals</i>
				<b>88,552.94</b>	<b>Amount for future insurance costs</b>

The following requirements add costs and administration:

- ACA Reporting
- PCORI Fee
- State Assessments

The NWAB has paid the balance owed from previous years, and the amount billed per employee has been adjusted to \$1804.62 which is based on their 18 month average cost per employee.

# NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	<b>Monthly Rate Charged</b>	<b>NWAB Payments</b>	<b>Cost to District</b>	<b>Payment over Cost</b>
December, 2019	3,107.92	115,537.11		
January, 2020	3,891.00	152,329.07		
February, 2020	3,891.00	156,220.07		
March, 2020	3,891.00	148,290.37		
April, 2020	3,891.00	140,507.47		
May, 2020	3,891.00	148,307.17		
June, 2020	3,891.00	144,408.77		
July, 2020	3,891.00	152,213.47		
August, 2020	3,891.00	156,124.07		
September, 2020	3,891.00	148,342.07		
October, 2020	3,891.00	156,124.07		
November, 2020	3,891.00	156,166.72		
		<u>1,774,570.43</u>	<u>1,100,051.00</u>	<u>674,519.43</u>

# NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	Monthly Rate Charged	NWAB Payments	Cost to District	Cost over Payments
December, 2018	2,107.92	88,532.64		
January, 2019	2,107.92	88,532.64		
February, 2019	2,107.92	88,532.64		
March, 2019	2,107.92	84,316.80		
April, 2019	2,107.92	84,316.80		
May, 2019	2,107.92	84,316.80		
June, 2019	2,107.92	77,015.86		
July, 2019	3,107.92	112,442.09		
August, 2019	3,107.92	115,532.71		
September, 2019	3,107.92	118,665.23		
October, 2019	3,107.92	118,665.23		
November, 2019	3,107.92	112,429.79		
		<u>1,173,299.23</u>	<u>1,715,784.00</u>	<u>(542,484.77)</u>

# NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	Monthly Rate Charged	NWAB Payments	Cost to District	Cost over Payments
December, 2017	2,107.92	73,777.20		
January, 2018	2,107.92	88,532.64		
February, 2018	2,107.92	88,532.64		
March, 2018	2,107.92	96,964.32		
April, 2018	2,107.92	94,856.40		
May, 2018	2,107.92	92,748.48		
June, 2018	2,107.92	94,856.40		
July, 2018	2,107.92	82,208.88		
August, 2018	2,107.92	84,316.80		
September, 2018	2,107.92	84,316.80		
October, 2018	2,107.92	88,532.64		
November, 2018	2,107.92	84,316.80		
		<u>1,053,960.00</u>	<u>1,536,266.00</u>	<u>(482,306.00)</u>

# NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	Monthly Rate Charged	NWAB Payments	Cost to District	Cost over Payments
December, 2016	2,107.92	88,532.64		
January, 2017	2,107.92	71,669.28		
February, 2017	2,107.92	75,885.12		
March, 2017	2,107.92	73,777.20		
April, 2017	2,107.92	69,561.36		
May, 2017	2,107.92	71,669.28		
June, 2017	2,107.92	73,777.20		
July, 2017	2,107.92	75,885.12		
August, 2017	2,107.92	73,777.20		
September, 2017	2,107.92	71,669.28		
October, 2017	2,107.92	71,669.28		
November, 2017	2,107.92	75,885.12		
		893,758.08	945,433.00	(51,674.92)

# NORTHWEST ARCTIC BOROUGH - HEALTH INSURANCE PLAN PARTICIPATION

	Monthly Rate Charged	NWAB Payments	Cost to District	Cost over Payments
December, 2015 est.	2,107.92	82,208.88		
January, 2016	2,107.92	82,208.88		
February, 2016	2,107.92	80,100.96		
March, 2016	2,107.92	84,316.80		
April, 2016	2,107.92	80,100.96		
May, 2016	2,107.92	77,993.04		
June, 2016	2,107.92	75,885.12		
July, 2016	2,107.92	90,640.56		
August, 2016	2,107.92	88,532.64		
September, 2016	2,107.92	80,100.96		
October, 2016	2,107.92	82,208.88		
November, 2016	2,107.92	82,208.88		
		<u>986,506.56</u>	<u>1,050,799.00</u>	<u>(64,292.44)</u>



# 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

### Technology Committee Meeting

### Conducted via Teleconference

Call in: 1-833-682-3239, Access code: 623 583 422#

### Agenda

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**November 29, 2021**

**11:00 a.m.**

1. Zoom for Board Use
  - a. Cost
  - b. Features
  - c. Teams vs Zoom
  - d. Next Steps
2. Questions

**Committee Members: Brad Reich, Margaret Hansen, Lawrence Jones Sr., Tillie Ticket**  
**Technology Director: Amy Eakin**

**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.



# Technology Committee

November 2021



# Agenda

- Zoom for Board Use
  - ✓ Cost
  - ✓ Features
  - ✓ Teams vs Zoom
  - ✓ Next Steps
- Questions



# Zoom Annual Cost



Item #	Qty	Description	Sell Price/Unit	Total Sale
<b>PAR1-EDU-BASE-NH1Y</b>	20	Zoom Education License, 1 Year 100 Attendee Capacity	\$90.00	\$1,800.00
<b>PAR1-CRC-1-PT1Y</b>	13	Zoom Cloud Room Connector Add-on (Enables H.323/SIP Interoperability and Polycom One Touch/Cisco One Tap Feature) - Concurrent Port -1 Year	\$499.00	\$6,487.00
<b>MISC A/V</b>	1	Zoom Large Meeting 1,000 - NH 1 year	\$1,080.00	\$1,080.00
<b>MISC A/V</b>	1	Zoom Integrated Audio - 1 Year	\$1,200.00	\$1,200.00
			<b>Subtotal</b>	\$10,567.00
			<b>Tax Total (%)</b>	\$0.00
			<b>Total</b>	\$10,567.00

# Zoom Features Included



**Line 1:** 20 education licenses is the minimum required to have an account with add-ons incorporated (Add-ons are below). This enables 20 people to have Zoom Licenses that don't just "shut off" at 45 minutes. 100 attendees can be invited and join these calls.

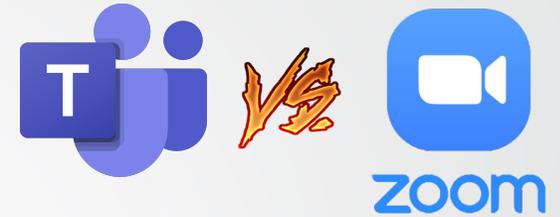
**Line 2:** 13 Room Connectors enable 13 videoconferencing endpoints to dial into Zoom Calls (without these, attendees can only join from a desktop/laptop or cell phone).

**Line 3:** Enables one person at a time to hold a meeting that hosts up to 1,000 Attendees (instead of merely 100). You can change who the host is that is enabled to use this "Large Meeting" capacity so that *Susie* gets use of it for today's meeting, and tomorrow, *John* can use it. It can't be used in two meetings simultaneously though, only one person at a time can use it.

**Line 4:** This enables you to have the phone dial in feature, for people to join via telephone.



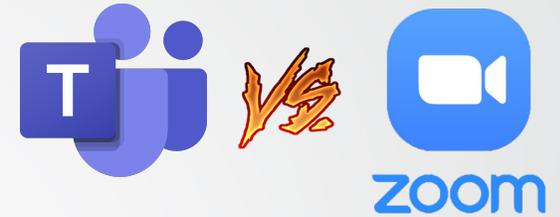
# Zoom vs. Teams at-a-Glance



	Microsoft Teams	Zoom
<b>Pricing</b>	Included in Current NWABSD Structure	\$10,567.00 Annually
<b>Video Quality</b>	HD 1080p by default	HD 720p by default, 1080p available in video quality settings
<b>Support</b>	<p>Microsoft 365 Business Basics, Microsoft 365 Business Standard and Office 365 E3 all include 99.9% uptime guarantee, 24/7 phone and web support</p> <p>Office 365 E3 also includes FastTrack deployment support</p> <p>Self-service documentation available via Microsoft Docs</p>	<p>Paid versions include phone support</p> <p>Zoom Enterprise plan includes dedicated Customer Success Manager</p> <p>Self-service documentation available via Zoom Help Center</p>
<b>Security</b>	<p>End-to-end encryption</p> <p>Multi-factor authentication</p> <p>Rights Management Services support</p> <p>Encryption at rest and in transit</p> <p>Secure Real-time Transfer Protocol technology</p> <p>HIPAA, GDPR, FedRAMP, SOC and FERPA compliant</p>	<p>256-bit TLS encryption</p> <p>AES-256 encryption</p> <p>Optional end-to-end encryption</p> <p>Additional security features such as passcode-protected meetings, audio signatures and screenshot watermarks</p>



# User Interface



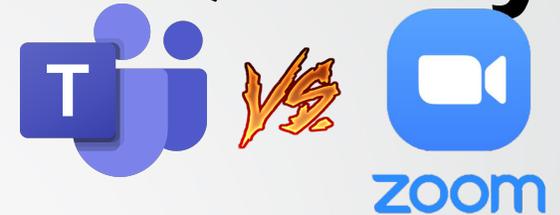
When it comes to its user interface (UI), Microsoft Teams' greatest strength is also its greatest weakness. One of the things that makes Teams so appealing is its ability to pull video conferencing, chat and a variety of other Microsoft 365 productivity and collaboration features and present them all within a single, unified dashboard.

That said, with so many features and functionalities all in one place, Teams can be somewhat difficult for first-time users to navigate and can even seem overwhelming.

Zoom, by comparison, offers far fewer features and integrations, however, it earns points for simplicity and ease of use. As a result, Zoom takes very little training to set up and use, meaning your remote teams can start collaborating that much sooner.



# Video Quality



Both Microsoft Teams and Zoom boast video resolutions of HD 1080p at 30 fps, placing them neck-in-neck in terms of video quality.

In order to achieve this resolution, Microsoft recommends a minimum connection of 2Mbps, while Zoom recommends a 3Mbps connection.

It's also worth noting that, unlike Teams, Zoom doesn't enable 1080p by default — instead, it uses 720p default, though users can manually change their video quality settings.

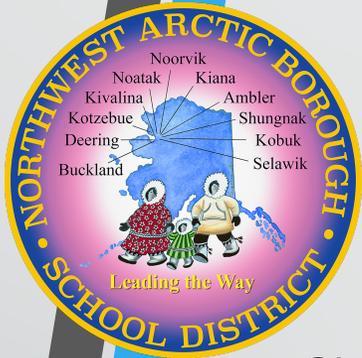
*\*NWABSD is looking into reducing the default resolution of Teams.*



Teams through Microsoft 365 offers a 99.9% financially backed uptime guarantee, round-the-clock phone and web support and FastTrack deployment support. Office 365 E3 offers all of the support options shown above, plus FastTrack deployment support. (*NWABSD is E3*)

By comparison, organizations that use the free version of Zoom get free 24/7 online support; all paid versions of Zoom also come with phone support, and the Zoom Enterprise plan includes a dedicated Customer Success Manager.

Both Microsoft Teams and Zoom both provide extensive documentation — including training videos, online webinars, customer forums and more — free of charge via Microsoft Docs and the Zoom Help Center, respectively.



Given that Microsoft is renowned for its security, there's really no contest here. Microsoft Teams leverages end-to-end encryption, multi-factor authentication, Rights Management Services support, at rest and in-transit encryption and Secure Real-time Transport Protocol technology for audio and video data. Microsoft's Reports hub (formerly known as the Microsoft Transparency Hub) and official Teams security and compliance overview also provide end users with detailed information about the company's privacy policies and how it handles user data. Depending on which industry your organization operates in, this transparency could prove essential from a compliance standpoint. According to a recent [press release](#) from Microsoft, Teams is HIPAA, GDPR, FedRAMP, SOC and FERPA compliant.

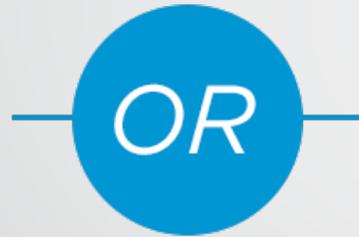
By comparison, Zoom offers 256-bit TLS encryption, AES-256 encryption and optional end-to-end encryption. It also provides meeting hosts with a variety of security capabilities, including waiting rooms for attendees, audio signatures, screen share watermarks and passcode-protected meetings. Zoom only stores basic information pulled from user account profiles, such as email address, user password, first name, last name and company name. Though Zoom claims to take security seriously, the platform has experienced [multiple security breaches](#) in recent months and has been criticized for its vague or misleading privacy and encryption policies. Though Zoom is still fine to use in most instances, organizations that discuss sensitive subjects during video conferences or are subject to strict data regulations might want to think twice.



# Next Steps



1. Continue forward with the Board using Teams



2. Request Board approval for the Board purchase and Board implementation of Zoom



# Questions





Solutionz, Inc.  
 901 Bringham Ave  
 Los Angeles CA 90049

## Custom Quote/Estimate

Quote/Estimate #: 029830  
 Date Quoted: 10/26/2021  
 Expiration Date: 11/25/2021  
 Total Estimate: \$10,567.00

**Bill To**

Lois Booth  
 Northwest Arctic Borough School District  
 (907) 442-1800  
 accountspayable@nwarctic.org  
 United States

**Ship To**

Amy Eakin  
 NW Arctic Borough School Dist  
 REF: PO# 220310  
 744 East Third  
 Kotzebue AK 99752  
 (907) 442-1830

**Sales Rep:** Gwynne Sullivan

**Phone:** (480) 407-4599

**Email:** [gsullivan@solutionzinc.com](mailto:gsullivan@solutionzinc.com)

*All Sales are final. All estimates must be signed and deposits received before equipment can be ordered or work can begin.*

Terms	P.O. Number	Shipping Method
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Net 15

Item #	Qty	Description	Sell Price/Unit	Total Sale
PAR1-EDU-BASE-NH1Y	20	Zoom Education License, 1 Year 100 Attendee Capacity	\$90.00	\$1,800.00
PAR1-CRC-1-PT1Y	13	Zoom Cloud Room Connector Add-on (Enables H.323/SIP Interoperability and Polycom One Touch/Cisco One Tap Feature) - Concurrent Port -1 Year	\$499.00	\$6,487.00
MISC A/V	1	Zoom Large Meeting 1,000 - NH 1 year	\$1,080.00	\$1,080.00
MISC A/V	1	Zoom Integrated Audio - 1 Year	\$1,200.00	\$1,200.00

**Subtotal** \$10,567.00

**Tax Total (%)** \$0.00

**Total** \$10,567.00



Solutionz, Inc.  
901 Bringham Ave  
Los Angeles CA 90049

## Custom Quote/Estimate

Quote/Estimate #:	029830
Date Quoted:	10/26/2021
Expiration Date:	11/25/2021
Total Estimate:	\$10,567.00

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To help us better manage your account, please provide us the following information:

Accounts Payable Contact: \_\_\_\_\_

Phone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

*ALL SALES ARE FINAL.* Prices are good for 30 days. Unless otherwise noted, taxes and shipping charges are not included. Actual shipping charges will appear on the invoice and may be different than quoted.

I, the undersigned, do hereby certify that I am an authorized agent of the above-referenced company or organization. I acknowledge that I have read, understand, and agree to the Solutionz Order Terms & Conditions provided under separate cover.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name and Title: \_\_\_\_\_

**\*\*\* Sign & return your Quote/Estimate to your sales rep or fax \*\*\***  
Also, please attach your corporate PO, if applicable.