

Jefferson Academy

Board of Directors Meeting

Date: March 16, 2026

Time: 7:00 PM

Location: 1425 S Angel St Kaysville, UT 84037



It is the desire and mission of this school to have every child be challenged, experience success and master basic skills, grow in academic ability and content knowledge, and develop an understanding and appreciation for our nation's heritage and founding principles.

Jefferson Academy will offer an academically challenging and content-rich history-centered curriculum that incorporates the study of American citizenship. Jefferson Academy will provide an environment in which every student has the opportunity to gain a strong foundation of knowledge in world and American history, classic literature, science, math and fine arts.

AGENDA

CALL TO ORDER

CONSENT ITEMS

- 01.12.2026 Board Meeting Minutes

REPORTS

- Policy Governance
 - Ends 1.2 Citizenship
 - Ends 1.3 Moral Excellence
 - Ends 1.4 Principles of Liberty
 - Ends 1.6 Community Involvement
 - Ends 1.7 School Culture
 - Executive Limitations 2.6 Asset Protection
- Director's Report
- Finance Report

VOTING AND DISCUSSION ITEMS

- School Land Trust Plan 2026/2027
- Lawn Care Agreement
- Financial Condition and Activities Policy
- Helpside Professional Employer Agreement

CALENDARING

- June 8, 2026 at AW Services Offices

ADJOURN

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.



EXECUTIVE SUMMARY

DIRECTORS REPORT

Nicole Jones will provide the Directors Report to the board.

Action: *No action needed*

FINANCE REPORT

Statement of Activities- Compares budget to actual as of the last closed month.

- As of February 28th, we are 67% of the way through the school year.
- **Local Revenue** is 120% of what was budgeted, mostly due to interest rates remaining higher than budgeted. The PTIF rate is dropping but still earning about \$11,000 last month.
- **Federal Revenue** is reimbursement based and must be applied for and spent before it can be received by the school. So far, this just represents lunch and the remainder of the Rural Grant.
- **Other Purchased Services expenses** are at 77%. This is due to increased insurance costs as well as insurance being paid for the full year.
- **Supplies and Materials expenses** are at 76%. This is due to those front-loaded curriculum costs as well as purchases made under new grants such as the Digital Teaching and Learning Grant.
- **Property expenses** are at 85% due to the dishwasher that was purchased for the food program. The budget shown only included safety grant purchases.

Statement of Financial Position- Balances compared from this year to last year.

- 2/28/2026 compared to 2/28/2025
- **Cash** is up almost \$300,000

Action: *No action needed*

SCHOOL LAND TRUST PLAN 2026/2027

Each year the school receives funding through the Utah School LAND Trust Program, which distributes state School LAND Trust revenue to support improved student academic achievement. The School LAND Trust Plan outlines how resources will be used to support measurable academic growth for all students.

Action: *Board Vote*

LAWNCARE AGREEMENT

Bids for lawn care services were requested and received from several vendors. The proposals were reviewed based on the services offered, cost, and each vendor's ability

to meet the school's needs. After reviewing the bids, a recommended vendor was identified as the best fit for the needs and budget.

Action: *Board vote needed*

FINANCIAL CONDITION AND ACTIVITIES POLICY

Amendments to the Purchasing Policy increase the spending authorization limits. The updated thresholds are as follows:

- Up to \$10,000: The Executive Director may make purchases or commitments without additional approval.
 - \$10,001 – \$20,000: Purchases or commitments require the signature of either the Board Chair or the Financial Coordinator.
 - Over \$20,000: Purchases or commitments require prior approval from the Board.
- The policy also clarifies that purchases may not be split into smaller amounts to avoid these approval thresholds.

Action: *Board vote needed*

HELPSIDE PROFESSIONAL EMPLOYER AGREEMENT

A new Professional Employer Agreement between the school and Helpside is being presented for board approval. Under the Utah Procurement Code, contract terms are generally limited to five years, with limited exceptions. Helpside provides a comprehensive suite of services, including payroll administration, 401(k) benefits, FMLA administration, unemployment support, and workers' compensation coverage. Helpside has consistently delivered high-quality, comprehensive services at competitive rates. The terms of the new agreement are consistent with the expiring agreement. It is recommended that the Board approve the Professional Employer Agreement with Helpside and authorize the Board President to execute the agreement on behalf of the school.

Action: *Board Vote, authorize board chair to sign*

Jefferson Academy

Board of Directors Meeting

Date: January 12, 2026

Location: 290 N Flint Street, Kaysville, UT 84037

In Attendance: Natalie Allman, Alana Wilson, Paul Smith, Katie Browning

Excused Board Members: Keith Facer

Others Present: Hannah Dorius, Heidi Bauerle, Ken Jeppesen



MINUTES

CALL TO ORDER

Alana Wilson called the meeting to order at 7:09PM.

AUDIT PRESENTATION & TRAINING

Ken Jeppesen presented the audit presentation & training. The audit conducted was concluded with a fully clean opinion. Each of the financial analyses were presented to the board with important line items explained at length. The compliance requirements tested this year were budgetary compliance, fraud risk assessment, crime insurance for public treasurers, internal control systems, and public education programs.

Ken Jeppesen left the meeting at 7:36PM.

CONSENT ITEMS

- 11.10.2025 Board Meeting and Closed Session Minutes

Alana Wilson made a motion to approve the 11.10.2025 Board Meeting and Closed Session Minutes. Natalie Allman seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

REPORTS

- Policy Governance
- Director's Report

Nicole Jones presented the Director's Report. Parent Teacher conferences were wrapped up in November. The friendship and service crew was implemented before Winter Break. Food drive, 2nd year of the angel tree to support the Kaysville Gives. Had the holiday open houses and shares student work and learning. The parents seemed to enjoy it and find value in it. Middle of year testing is underway as of this week. The literacy scores are above state average.

VOTING AND DISCUSSION ITEMS

- Teacher Computers

Nicole Jones spoke to the board about the need for teacher computers to be

purchased. The current computers that the teachers are using are 6 years old and need to be replaced. Teachers use their computers daily for instruction and incur a lot of wear and tear over the years.

Alana Wilson made a motion to approve the Teacher Computers up to \$20,000. Paul Smith seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

- Dishwasher Purchase

Nicole Jones spoke to the board about the need to purchase a new dishwasher. The recommended company includes removal of the old dishwasher, install of the new dishwasher, and the price of the equipment. The board recommends to approve the Bargreen quote.

Alana Wilson made a motion to approve the Dishwasher Purchase quote through Bargreen up to \$23,000. Natalie Allman seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

- RFP for IT Services

Nicole Jones spoke to the board about the RFP for IT Services. The IT company's proposal was reviewed and scored. Nicole Jones recommended that ETS be approved as the IT Service Provider for Jefferson Academy.

Alana Wilson made a motion to award the RFP for IT Services to ETS. Natalie Allman seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

- 2026-2027 School Year Calendar

Nicole Jones presented the 2026-2027 School Year Calendar. This calendar is very similar to Davis School District and the Jefferson Academy 2025-2026 School Year Calendar. This calendar was made after a survey was sent. Survey answers were heavily considered.

Alana Wilson made a motion to approve the 2026-2027 School Year Calendar. Natalie Allman seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

CALENDARING

- Next Board Meeting March 16, 2026, at 7:00pm at Jefferson Academy Library.

ADJOURN

At 8:11PM Alana Wilson made a motion to adjourn. Natalie Allman seconded the motion. The motion passed unanimously. The votes were as follows: Natalie Allman, Aye; Alana Wilson, Aye; Paul Smith, Aye; Katie Browning, Aye.

Jefferson Academy

Statement of Activities

Created on March 10, 2026

For Prior Month

Reporting Book: ACCRUAL
 As of Date: 03/10/2026
 Location: Jefferson Academy

	Annual	Year-to-Date	
	June 30, 2026	February 28, 2026	
	Budget	Actual	% of Budget
Net Income			
Income			
Revenue From Local Sources	141,040	169,802	120.4 %
Revenue From State Sources	5,607,887	3,794,314	67.7 %
Revenue From Federal Sources	194,663	46,254	23.8 %
Total Income	5,943,590	4,010,370	67.5 %
Expenses			
Instruction/Salaries	2,797,843	1,685,821	60.3 %
Employee Benefits	643,635	363,771	56.5 %
Purchased Prof & Tech Serv	621,238	317,996	51.2 %
Purchased Property Services	212,659	114,352	53.8 %
Other Purchased Services	132,643	102,404	77.2 %
Supplies & Materials	646,488	488,002	75.5 %
Property	35,750	30,310	84.8 %
Debt Services & Miscellaneous	667,405	445,974	66.8 %
Total Expenses	5,757,661	3,548,630	61.6 %
Total Net Income	185,929	461,740	248.3 %

Jefferson Academy
Statement of Financial Position
Created on March 10, 2026
For Prior Month

Reporting Book:
As of Date:
Location:

ACCRUAL
03/10/2026
Jefferson Academy

	Period Ending	Period Ending
	02/28/2026	02/28/2025
	<u>Actual</u>	<u>Actual</u>
Assets & Other Debits		
Current Assets		
Operating Cash	3,907,382	3,615,491
Accounts Receivables	9,890	936
Total Current Assets	<u>3,917,272</u>	<u>3,616,427</u>
Restricted Cash	<u>452,329</u>	<u>452,638</u>
Net Assets		
Fixed Assets	11,116,802	11,042,599
Depreciation	(3,564,442)	(3,285,525)
Total Net Assets	<u>7,552,360</u>	<u>7,757,074</u>
Total Assets & Other Debits	<u>11,921,961</u>	<u>11,826,139</u>
Liabilities & Fund Equity		
Current Liabilities	<u>35,793</u>	<u>30,822</u>
Long-Term Liabilities	<u>10,391,000</u>	<u>10,713,000</u>
Fund Balance	<u>1,020,006</u>	<u>454,517</u>
Net Income	<u>475,162</u>	<u>627,800</u>
Total Liabilities & Fund Equity	<u>11,921,961</u>	<u>11,826,139</u>

School LAND Trust Plan 2026-2027 - Jefferson Academy

Please Finish your Plan Submission

Saving Your Work:

- **Most sections autosave:** After completing a section, click on a blank screen area to save.
- **Some sections require manual save:** For the "Action Plan Steps and Expenditures" sections, you **must click "Save."**
- **Best practice:** Save your work in a separate document as a backup.

Important:

- Each goal needs at least one trust land expenditure.
- Clearly describe how funds will achieve each goal. Unclear or misaligned expenses will result in the plan being returned for edits.

At least one goal is required.

Goal #1

close

Goal Statement

close

Councils will formulate concise and impactful student-centered, data-driven, and evidence-based goal statements. A goal statement should answer the question *"What specific academic outcomes will students achieve by the end of the upcoming school year as a direct result of the Land Trust Plan?"*

Example:*By the end of the school year, we will have 60% of K-6 students achieve Typical or Better growth in literacy skills as measured by the Acadience Reading EOY Pathways of Progress composite score.*

Students in grades K-6 will increase in language arts skills including writing, reading, fluency, phonics and comprehension skills as measured by the Acadience assessment Fall 2026 as

compared to Spring 2027. Spring 2027 scores will increase in mastery as compared to Spring 2026.

Academic Area

close

Refer to R277-4.77-4 for a list of priority academic areas. A council may, supported by a council's data discussion, include goals in other areas if priorities have been addressed, or another area is a priority of the local board.

Please **select only** the priority area/s that your data determines as an area of most critical academic need. For each academic priority selected, there **must** be a corresponding assessment or data tool in the Measurements section. *If academic areas are selected that don't have a corresponding measurement, the plan may be sent back for edits.*

Priorities

- College and Career Readiness (*secondary schools only*)
- English/Language Arts
- Graduation Rate Increase (*secondary schools only*)
- Mathematics
- Science

Other Academic Areas in Core Standards

- CTE (Career and Technical Education)
- Educational Technology/Library/Media
- Financial Literacy
- Fine Arts
- Health
- Physical Education
- Social Studies
- Technology
- World Languages

Measurements

close

Describe the data and/or other relevant indicators supporting the decision of the council to identify this academic area as a "most critical academic need."

What measurements will be used to indicate success? Limit the data sources to meaningful tools so that progress may be gauged. Please remember, for each academic area selected above, there

must be a corresponding measurement.

All students will be assessed using the Acadience Reading Fall 2026. Students below benchmark will be identified for reading interventions and be progress monitored. All students will be assessed again using Acadience Reading in winter and spring. Students will be assessed in Spring 2026 in RISE. Based on scores from 2026, students will receive reteaching and interventions to increase mastery of language arts materials. They will be assessed again on the RISE Spring Summative 2027.

Action Plan Steps and Expenditures

close

Action plan steps should be specific and clear on what is being purchased with School LAND Trust funds and how the steps support the goal. Please:

- List and number the specific steps.
- Write the School LAND Trust funding amount in parentheses at the end of each action step.

If implementing cross-curricular methods (using art to support a math goal) that do not have an assessment or data tool, explain how the method will be implemented in the action plan steps.

Example:

1. *We will hire a paraprofessional for reading groups. (\$10,000)*
2. *The paraprofessional will work with small groups of students to provide structured support in areas of reading that the students are struggling with.*
3. *We will purchase reading software to complement classroom literacy instruction. (\$5,000)*
 1. All students will take Acadience in Fall 2026. Also teachers will spend time analyzing RISE 2026 data.
 2. Students below benchmark on Acadience and those not proficient on RISE Spring 2026 will be identified for reading and language arts interventions.
 3. They will regularly progress monitored using Acadience progress monitoring probes, school CBMs and RISE interims and benchmarks.
 4. Students at risk will have access to explicit reading and writing instruction to help build their language arts skills.
 5. Teachers will analyze student data and adjust instruction to meet student needs with appropriate and highly recommended curriculum and best instructional practices. Funds will be used to purchase technology to support teacher explicit instruction. (\$50,000)

Action Steps and Expenditures must be saved manually using this button:

SAVE ACTION PLAN STEPS

Category	Description	Estimated Cost		
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	Students will have access to reading, writing and language arts curriculums to help build language arts skills. Teachers will analyze student data and then use purchased technology hardware to deliver explicit instruction to meet student needs.	\$50,000.00	Edit/Cancel Save	Delete
	Total:	\$50,000.00		

[Scroll to the top to add a goal.](#)

Goal #2

close

Goal Statement

close

Councils will formulate concise and impactful student-centered, data-driven, and evidence-based goal statements. A goal statement should answer the question *"What specific academic outcomes will students achieve by the end of the upcoming school year as a direct result of the Land Trust Plan?"*

Example: *By the end of the school year, we will have 60% of K-6 students achieve Typical or Better growth in literacy skills as measured by the Acadience Reading EOY Pathways of Progress composite score.*

Students in K-6 will increase in math fact fluency as measured by the Acadience Math assessment from Fall 2026-Spring 2027 to achieve proficiency in grade level math.

Academic Area

close

Refer to [R277-4.77-4](#) for a list of priority academic areas. A council may, supported by a council's data discussion, include goals in other areas if priorities have been addressed, or another area is a

priority of the local board.

Please **select only** the priority area/s that your data determines as an area of most critical academic need. For each academic priority selected, there **must** be a corresponding assessment or data tool in the Measurements section. *If academic areas are selected that don't have a corresponding measurement, the plan may be sent back for edits.*

Priorities

- College and Career Readiness (*secondary schools only*)
- English/Language Arts
- Graduation Rate Increase (*secondary schools only*)
- Mathematics
- Science

Other Academic Areas in Core Standards

- CTE (Career and Technical Education)
- Educational Technology/Library/Media
- Financial Literacy
- Fine Arts
- Health
- Physical Education
- Social Studies
- Technology
- World Languages

Measurements

close

Describe the data and/or other relevant indicators supporting the decision of the council to identify this academic area as a "most critical academic need."

What measurements will be used to indicate success? Limit the data sources to meaningful tools so that progress may be gauged. Please remember, for each academic area selected above, there must be a corresponding measurement.

All students will be assessed using Acadience Math in the Fall 2026. Students below benchmark will be identified for math interventions and will be progress monitored. All students will be assessed again using Acadience Math Spring 2027 to show growth.

Action Plan Steps and Expenditures

close

Action plan steps should be specific and clear on what is being purchased with School LAND Trust funds and how the steps support the goal. Please:

- List and number the specific steps.
- Write the School LAND Trust funding amount in parentheses at the end of each action step.

If implementing cross-curricular methods (using art to support a math goal) that do not have an assessment or data tool, explain how the method will be implemented in the action plan steps.

Example:

- 1. We will hire a paraprofessional for reading groups. (\$10,000)*
- 2. The paraprofessional will work with small groups of students to provide structured support in areas of reading that the students are struggling with.*
- 3. We will purchase reading software to complement classroom literacy instruction. (\$5,000)*
 1. Teachers will administer Acadience Math.
 2. Students below benchmark will be progress monitored.
 3. They will also receive interventions with either a classroom teacher or a teacher assistant.
 4. Teachers will use research informed teaching practices in their math instruction.
 5. The school will use fact fluency software to improve student math skills.
 6. The software will be purchased for student use and for teacher tracking. (\$4900)

Action Steps and Expenditures must be saved manually using this button:

SAVE ACTION PLAN STEPS

Category	Description	Estimated Cost		
Software < \$5,000	Students will use fact fluency software and technology to improve their math skills. We will purchase a fact fluency software program.	\$4,900.00	<input type="button" value="Edit/Cancel"/> <input type="button" value="Save"/>	<input type="button" value="Delete"/>
	Total:	\$4,900.00		

[Scroll to the top to add a goal.](#)

Goal Statement

close

Councils will formulate concise and impactful student-centered, data-driven, and evidence-based goal statements. A goal statement should answer the question *"What specific academic outcomes will students achieve by the end of the upcoming school year as a direct result of the Land Trust Plan?"*

Example: *By the end of the school year, we will have 60% of K-6 students achieve Typical or Better growth in literacy skills as measured by the Acadience Reading EOY Pathways of Progress composite score.*

By the end of the school year, student achievement in Science will increase as measured by RISE assessment data. STEM instruction will be strengthened through intentional integration of technology and hands-on, three-dimensional learning experiences that deepen student understanding.

Academic Area

close

Refer to [R277-4.77-4](#) for a list of priority academic areas. A council may, supported by a council's data discussion, include goals in other areas if priorities have been addressed, or another area is a priority of the local board.

Please **select only** the priority area/s that your data determines as an area of most critical academic need. For each academic priority selected, there **must** be a corresponding assessment or data tool in the Measurements section. *If academic areas are selected that don't have a corresponding measurement, the plan may be sent back for edits.*

Priorities

- College and Career Readiness (*secondary schools only*)
- English/Language Arts
- Graduation Rate Increase (*secondary schools only*)
- Mathematics
- Science

Other Academic Areas in Core Standards

- CTE (Career and Technical Education)
- Educational Technology/Library/Media
- Financial Literacy
- Fine Arts
- Health
- Physical Education

Social Studies

Technology

World Languages

Measurements

close

Describe the data and/or other relevant indicators supporting the decision of the council to identify this academic area as a "most critical academic need."

What measurements will be used to indicate success? Limit the data sources to meaningful tools so that progress may be gauged. Please remember, for each academic area selected above, there must be a corresponding measurement.

Increase in student RISE scores in grades 4-6 from 2026-2027.

Action Plan Steps and Expenditures

close

Action plan steps should be specific and clear on what is being purchased with School LAND Trust funds and how the steps support the goal. Please:

- List and number the specific steps.
- Write the School LAND Trust funding amount in parentheses at the end of each action step.

If implementing cross-curricular methods (using art to support a math goal) that do not have an assessment or data tool, explain how the method will be implemented in the action plan steps.

Example:

1. *We will hire a paraprofessional for reading groups. (\$10,000)*
2. *The paraprofessional will work with small groups of students to provide structured support in areas of reading that the students are struggling with.*
3. *We will purchase reading software to complement classroom literacy instruction. (\$5,000)*
 1. Educators will engage in ongoing professional development supported by a school-based STEM specialist to strengthen instructional practices, deepen content knowledge, and enhance confidence in delivering high-quality STEM instruction. (\$2,000)
 2. A STEM specialist will be retained to lead STEM lab instruction, coordinate lab experiences, facilitate STEM specials classes, and manage necessary materials and supplies. In collaboration with classroom educators, the STEM specialist will provide engaging,

creative, and personalized learning experiences designed to build student understanding and skill development. (\$18,000 STEM specialist) (\$6,000 Supplies)

3. Computer science, robotics, and coding equipment will be purchased to increase rigor and provide meaningful opportunities for hands-on experiments, simulations, and applied learning experiences. (\$10,000)

Action Steps and Expenditures must be saved manually using this button:

SAVE ACTION PLAN STEPS

Category	Description	Estimated Cost		
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	Educators will engage in professional development supported by a school-based STEM specialist to strengthen instructional skills and content knowledge. The STEM specialist will lead STEM labs, coordinate lab experiences, and implement STEM specials while collaborating with teachers to provide engaging, creative, and personalized learning experiences that build student understanding and skills.	\$20,000.00	Edit/Cancel Save	Delete
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	STEM lessons will require technology related supplies and equipment.	\$10,000.00	Edit/Cancel Save	Delete
Expendable items that are consumed, wornout or lose identity through use (paper, science and art supplies), food for a cooking class, a field trip, or a parent night (consistent with LEA policy)	STEM specials classes will require supplies to implement lessons.	\$6,000.05	Edit/Cancel Save	Delete
	Total:	\$36,000.05		

[Scroll to the top to add a goal.](#)

Summary of Estimated Expenditures

Category	Estimated Cost (entered by the school)
Expendable items that are consumed, wornout or lose identity through use (paper, science and art supplies), food for a cooking class, a field trip, or a parent night (consistent with LEA policy)	\$6,000.05
Software < \$5,000	\$4,900.00
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	\$60,000.00
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	\$20,000.00
Total:	\$90,900.05

Funding Estimates – Please Update

Estimates	Totals	
Carry-over from 2024-2025	\$0.00	
Distribution for 2025-2026	\$78,361.21	
Total Available Funds for 2025-2026	\$78,361.21	
Estimated Funds to be Spent in 2025-2026	\$ 78360	<input type="button" value="Update"/>
Estimated Carry-over from 2025-2026	\$1.21	
Estimated Distribution for 2026-2027	\$91,008.75	
Total Available Funds for 2026-2027	\$91,009.96	
Summary of Estimated Expenditures for 2026-2027	\$90,900.05	
Estimated Carry-over to 2027-2028	\$109.91	

The Estimated Distribution is subject to change if student enrollment counts change.

Publicity

[Click here to order free stickers for identifying School LAND Trust purchases such as books or computers.](#)

The following items are the proposed methods of how the Plan would be publicized to the community:

- Letters to policymakers and/or administrators of trust lands and trust funds
- Other: Please explain
- School assembly
- School marquee

School newsletter or website

Social Media

Stickers that identify purchases made with School LAND Trust funds

Council Plan Approval

Please indicate the voting results to approve this school plan.

Number Approved:

Number Not Approved:

Number Absent:

Date:



Please attach relevant documents here. *If attaching data to support the Measurement section, please ensure it does not include any student data.*

Please submit comments below.

Comments are only seen by those involved in submitting or reviewing plans and cannot be edited or removed.

There is a 1000 character limit on the comments. SAVE button shows when entry is made. Character Count: 0

Review before Submission

Please review the following before submitting (once approved, this report is public):

- **Spelling & grammar**
- **There is no student or personal data**

Once submitted the report may only be revised through the review process by the LEA Reviewer or Charter (Business Administrator) Reviewer. Once the review is complete, the report may not be edited.

This form is ready for display on the public website. Spelling and grammar have been checked. There is no student data included.

[BACK](#)

Policy Type: Executive Limitations

Policy Title: 2.4. Financial Condition and Activities

With respect to the actual, ongoing financial condition and activities, the Executive Director shall not cause or allow the development of fiscal jeopardy or a material deviation of actual expenditures from Board priorities established in Ends policies.

Accordingly, the Executive Director shall not:

1. Expend more funds than have been received in the fiscal year to date unless the Board's debt guideline is met.
2. Incur debt in an amount greater than can be repaid by certain and otherwise unencumbered revenues within sixty days.
3. Use any long-term capital reserves.
4. Use any rainy-day funds without prior Board approval.
5. Conduct interfund shifting in amounts greater than can be restored to a condition of discrete fund balances by certain, otherwise unencumbered revenues within a reasonable time.
6. Fail to settle payroll and debts in a timely manner.
7. Allow tax payments or other government ordered payments or filings to be overdue or inaccurately filed.
8. Make a single purchase or commitment of greater than \$10,000 and up to \$20,000 without the signature of either the Board Chair or Financial Coordinator; or a single purchase or commitment of greater than \$20,000 without prior approval of the Board. Splitting orders to avoid these limits is not acceptable.
 - a. For clarity, the Executive Director may make purchases or commitments of up to \$10,000 without additional approval; purchases or commitments of more than \$10,000 and up to \$20,000 with the signature of either the Board Chair or Financial Coordinator; and purchases or commitments of more than \$20,000 with prior approval of the Board.
9. Fail to aggressively pursue receivables after a reasonable grace period.
10. Fail to depreciate items consistent with GAAP (Generally Accepted Accounting Practices).
11. Fail to budget and purchase items in a manner consistent with prioritization of Board Ends.

Adopted: June 13, 2013

Revised: January 22, 2018

Revised: October 17, 2022

Revised: March 16, 2026

Monitoring Method: Internal; External

Monitoring Frequency: Monthly; Annually (December)



OFFICE ADDRESS: 5932 South 4300 West
Hooper, Utah, 84315

TELEPHONE: (385) 244 - 9753
E-MAIL: Dgama@jdlawncare.org

BID PROPOSAL & CONTRACT

CUSTOMER NAME: Jefferson Academy BILLING ADDRESS: 1425 S Angel St Kaysville, UT 84037		CONTACT NAME: Nicole Jones CONTACT PHONE: (801) 593-8200 CONTACT EMAIL: Njones@jeffersonacademy.org		
JOB NAME: Jefferson Academy JOB ADDRESS: 1425 S Angel St Kaysville, UT 84037		JOB NUMBER: 2602102 BID DATE: 2/27/2026		
DESCRIPTION:	QUANTITY	UoM	UNIT PRICE	PRICE
WEEKLY LAWCARE				
MOWING	28	EA.	\$300.00	\$8,400.00
^ ALL INCLUDED (EDGING/TRIMMING/BLOWING)				
Trimming	7	EA.	\$150.00	\$1,050.00
Once Every Month (Trees, Bushes)				
Flower Bed Clean-Up	14	EA.	\$50.00	\$700.00
Every Two Weeks				
ADDITIONAL SERVICES				
Sprinkler Start-up/Winterization	2	EA.	\$225.00	\$450.00
Aeration (One time Spring/Fall)	2	EA.	\$320.00	\$640.00
Fertilizer	4	EA.	\$615.00	\$2,460.00
Playground Bark Install/Labor Included	75	CYD	\$115.00	\$8,625.00
Sprinkler Labor Man Hour	1	HR	\$45.00	
TOTAL BID PRICE:				\$22,325.00

PAYMENT TERMS:

Payment is due at completion of the project without any retention being withheld. Invoices are subject to 1.5% interest per month beginning 30 days following the due date. In the event it becomes necessary for JD Lawncare LLC to file suit to collect any money due, hereunder or for the breach thereof the owner agrees to pay in addition to the amount due, all costs of enforcement including reasonable attorney fees. In the event of dispute between JD Lawncare LLC and the buyer, the parties agree to arbitration through the American Arbitration Association.

ACCEPTED: The prices, specification, and conditions, are satisfactory and are hereby accepted: Buyer Signature: _____ Date Of Acceptance: _____	CONFIRMED: JD Lawncare LLC warranties all Landscape/Lawncare for a period of 1 year of completion. Authorized Signature: <i>David Gama</i> Estimator Name: David Gama Contact Info: (385) 244 - 9753
---	---



Statement Of Qualifications

Project: Jefferson Academy
 1425 S Angel St,
 Kaysville, UT
 Office: 5932 S 4300 W
 Hooper, Utah 84315

Telephone: (385) 244-9753
 Email: Dgama@jdlawncares.org

The undersigned certifies that the information provided herein is true and sufficiently complete and accurate.

Signature: *David Gama*

Name: David Gama

Title: Owner

Date: 2/27/2026

Work Experience

Project Information	Discription Of Work	References
Holy Cross Hospital - Davis 1600 W Antelope Dr, Layton, Utah Started Project: April of 2023 Ended Project : Continuing	Type of work included in this project, weekly mowing, once a month trimming, weekly weed control, sprinkler repair, winterization of sprinklers, tree trimming, Fall/Spring Clean up, Snow Removal/Ice melt for sidewalks and parking lot.	Michael Phillips (Due to Code Of Common Spirt Health, reference cannot be contacted)
Holy Cross Hospital - Weber 3451 W 5600 ST Roy, Utah Started Project: April of 2023 Ended Project : Continuing	Type of work included in this project, weekly mowing, once a month trimming, weekly weed control, sprinkler repair, winterization of sprinklers, tree trimming, Fall/Spring Clean up, Snow Removal/Ice melt for sidewalks and parking lot.	Michael Phillips (Due to Code Of Common Spirt Health, reference cannot be contacted)
Two Doors Property Management Managed 10 Propertys Started Project: March 2024 Ended Project : Continuing	Type of work included in this project, weekly mowing, once a month trimming, every two weeks weed control, sprinkler repair, winterization of sprinklers, and any requested projects.	Maria Boman (801) 644-7653 office@twodoorsmanagement.com
Sun Down Property Management P.O. Box 901375 Sandy, UT 84090	Type of work included in this project, weekly mowing, once a month trimming, every two weeks weed control, sprinkler repair, winterization of sprinklers, and any requested projects.	Tia Stock (801) 231-8990 tia@sunpropertyutah.com
Logic PM 8180 S 700 E, Suite 120 Sandy City, UT	Type of work included in this project, weekly mowing, once a month trimming, every two weeks weed control, sprinkler repair, winterization of sprinklers, and any requested projects.	Tia Stock (801) 231-8990 tia@logicpm.com
Jefferson Academy 1425 S Angel St, Kaysville, UT	Type of work included in this project consist of weekly mowing, irrigation start/turn off sprinklers, fertilization, aeration, and sprinkler repair. As well any requested services.	Nicole Jones njones@jeffersonacademy.com
Terra Strada PO Box 377 Kaysville, UT	Type of work included in this project consist of weekly mowing, flower-bed clean-up, trimming (bushes/trees), sprinkler irrigating start/stop, fertilization, sprinkler repair, and any services requested projects.	Manager@terrastrada.com



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

02/17/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Trucordia Insurance Services, LLC Trucordia Ins Svs, LLC DBA: 9980 South 300 West, Suite 120 Sandy UT 84070	CONTACT NAME: Nancy Velazquez PHONE (A/C, No, Ext): (801) 984-6100 E-MAIL ADDRESS: Nancy.Velazquez@Trucordia.com	FAX (A/C, No):
	INSURER(S) AFFORDING COVERAGE	
INSURED JD Lawncare LLC 5932 S 4300 W Hooper UT 84315-9587	INSURER A: Auto-Owners Insurance Co	NAIC # 18988
	INSURER B: Owners Insurance Company	32700
	INSURER C: WCF Mutual Insurance Company	10033
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER: CL2621777635

REVISION NUMBER:


THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS			
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			57661601	11/01/2025	11/01/2026	EACH OCCURRENCE \$ 1,000,000			
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000			
	GEN'L AGGREGATE LIMIT APPLIES PER:									MED EXP (Any one person) \$ 10,000
	<input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PERSONAL & ADV INJURY \$ 1,000,000			
	OTHER:						GENERAL AGGREGATE \$ 2,000,000			
B	AUTOMOBILE LIABILITY			5566160101	11/01/2025	11/01/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000			
	<input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> 19						BODILY INJURY (Per person) \$			
	<input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident) \$			
							PROPERTY DAMAGE (Per accident) \$			
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB						Uninsured motorist BI \$ 1,000,000			
	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE						EACH OCCURRENCE \$			
	DED RETENTION \$						AGGREGATE \$			
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			4110450	01/31/2026	01/31/2027	PER STATUTE OTH-ER			
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y / N	N / A				E.L. EACH ACCIDENT \$ 1,000,000			
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000			
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000			

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

EVIDENCE OF COVERAGE

CERTIFICATE HOLDER**CANCELLATION**

JD Lawncare LLC 5932 S 4300 W Hooper, UT 84315	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
--	--

© 1988-2015 ACORD CORPORATION. All rights reserved.



SPENCER J. COX
Governor

DEIDRE M. HENDERSON
Lieutenant Governor

UTAH DEPARTMENT OF COMMERCE

Division of Corporations and Commercial Code

MARGARET W. BUSSE
Executive Director

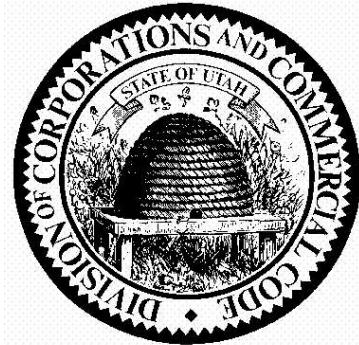
ADAM WATSON
Division Director

January 29, 2025

CERTIFICATE OF EXISTENCE

Registration Number: 13361209-0160
Business Name: JD LAWCARE LIMITED LIABILITY COMPANY
Principal Office Address: 5932 S 4300 W, HOOPER, UT 84315
Registered Date: 04/14/2023
Entity Type: DOMESTIC LIMITED LIABILITY COMPANY
Current Status: ACTIVE - CURRENT

The Division of Corporations and Commercial Code of the State of Utah, custodian of the records of business registrations, certifies that the business entity on this certificate is authorized to transact business and was duly registered under the laws of the State of Utah. The Division also certifies that this entity has paid all fees and penalties owed to this state; its most recent annual report has been filed by the Division unless the status above is delinquent; and, that Articles of Dissolution have not been filed.



Adam Watson

Adam Watson

Director

Division of Corporations and Commercial Code

Certificate Number: 202501290009305

Enter the certificate number at <https://businessregistration.utah.gov/> to verify this certification.

Division of Corporations and Commercial Code

Heber M. Wells Building • 160 East 300 South • P.O. Box 146705 Salt Lake City, UT 84114-6741

www.corporations.utah.gov • telephone (801) 530-4849 • toll-free in Utah (877) 526-3994 • fax (801) 530-6438

extreme green
 2085 West 150 South
 Ogden, UT 84404 USA
 +18015647852
 scottmill33@yahoo.com

Estimate

ADDRESS
Jefferson academy 1425 s. angel st. Kaysville, UT 84037

SHIP TO
Jefferson academy 1425 s. angel st. Kaysville, UT 84037

ESTIMATE #	DATE
1026	02/04/2026

SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
weekly maintance	weekly maintenance mowing (bagging grass) edging (around all buildings ,sidewalks,road ways, and fence line) trimming (around all trees and flower beds) blowing (blowing off all sidewalks roads and any property that gets clippings on) timer control (making adjustments when needed on sprinkler timers)	1	500.00	500.00
Areation jefferson	Aeration per time	1	550.00	550.00
Fertilizer jefferson	Fertilizer per application	1	550.00	550.00
Labor Per Hour	Sprinkler labor per man hour, this includes repairs, adjustments to sprinklers, timer adjustments, trimming bushes plants and trees, weed killer along fence lines.	1	60.00	60.00
play ground bark	play ground bark per yard	1	75.00	75.00
sprinkler shut down	blow out sprinkler lines	1	450.00	450.00

we appreciate your business and love to keep servicing your school. let me know if you have any questions or concerns.

SUBTOTAL	2,185.00
TAX	0.00
TOTAL	\$2,185.00

Accepted By

Accepted Date