



Strategic Goal 1	Strategic Goal 2	Strategic Goal 3	Strategic Goal 4	Strategic Goal 5
Student Achievement: <i>All action on teaching and learning will focus on empowering achievement at the highest level for each student.</i>	Learning Environments: <i>All buildings and facilities will support the learning and teaching needed to unlock the potential in each student.</i>	Staff Development: <i>All staff will learn, perform and lead in such a manner as to inspire learning for students.</i>	Community Engagement: <i>The entire school community will engage the families, residents and stakeholders for the purpose of increasing opportunities for students.</i>	Resources: <i>All resources, real and potential, will be planned, and allocated in the spirit of providing an exciting and secure future for the students and District.</i>

**LINN-MAR COMMUNITY SCHOOL DISTRICT  
BOARD WORK SESSION MINUTES  
SEPTEMBER 8, 2014**

**ATTENDEES:**

- Board: Hutcheson, Stark, Isenberg, Buchholz, Patterson, Gadelha, Wilson
- Administration: Mulholland, Morrison, Jensen, Anderson, Ramos, Ironside
- Absent: Halupnik and Christian

**CALL TO ORDER AND DETERMINATION OF A QUORUM**

The Linn-Mar Community School District Board of Directors work session was called to order in the Board Room of the Learning Resource Center by President Barry Buchholz at 5:00 PM. Roll was taken and it was determined a quorum was present.

**REVISION AND/OR ADOPTION OF THE AGENDA:    Motion 040-09-08**

Motion by Patterson to adopt the work session agenda as presented. Second by Hutcheson. Voice vote. Motion unanimously approved.

**WORK SESSION DISCUSSION/INFORMATION**

**2015-16 Superintendent Salary and Perks:**

JT Anderson, Linn-Mar CFO, provided research on comparable compensation ranges and perks as part of the preparation for contracting with a new superintendent for the 2015-16 school year. Data was collected from approximately 30 Iowa districts regarding base salary figures. Average base salary, *excluding annuity* is approximately \$190,000. Average total compensation package, including *annuity and other compensation negotiated*, averages \$215,000, median averages \$208,000, and minimum averages \$189,500. It was shared that Waukee and Council Bluffs districts have veteran superintendents and Waterloo, Johnston, and West Des Moines have new hires for the 2014-15 school year. For the 10 districts next to Linn-Mar in enrollment (5 up and 5 down) the average package was \$215,261; the median package was \$208,125. Anderson commented that there really wasn't a salary trend and figures varied across the board.

Buchholz clarified that the final compensation package will be negotiated by the Board President, the District CFO, HYA consultant, and the candidate. The final salary package will be public knowledge once the candidate is hired; but negotiations are confidential. Question raised about setting limits for reimbursement for travel/moving costs if requested by candidate. It was shared that both items could be included in negotiations with final candidate. The Board asked Stark to contact HYA Consultant, Ted Blaesing, to ask for current figures for travel/moving reimbursement as well as a timeline and responsibilities for the rest of the search process.

**Technology Update:**

Jeri Ramos, Executive Director of Technology, shared highlights on the technology initiatives and system updates including information on completed projects, technology initiatives for the 2014-15 school year, and a hit list of future items on which the Technology Department will focus. Technology Committee will be finalizing the technology plan for the year very soon. Ramos also shared three different options for the High School radio tower including: 1) remove the existing tower and build a new tower, 2) relocate existing tower, or 3) redesign tower in current location. It was shared that alternate bids would be requested from DLR Architects for removal/relocation versus redesign and the Board would base their final decision on how to proceed based on cost of project.

Ramos commented that the national average for computers/electronic devices per student is 1 per 4 students. Linn-Mar's average is 1 per 2 students. District is currently working on a 3-year renewal cycle for replacement of building computers/devices. Approximately 1,500 computers/electronic devices are replaced every three years. Technology is currently assessing whether the Nobis tablet is a good option for student use, as multiple user accounts can be set up on one device protected by passwords.

**2014-15 Assessment Schedule:**

Dirk Halupnik, Deputy Superintendent, shared the 2014-15 student assessment schedule clarifying various benchmark assessments as well as the new Early Literacy assessments.

**Additional Business:**

Hutcheson asked the Board to consider using one of the upcoming work sessions to discuss the effectiveness and efficiency of Board meeting discussions. Mulholland stated that she would look at the current Board schedule to find a date for this discussion.

**ADJOURNMENT: Motion 041-09-08**

Motion by Patterson to adjourn the work session at 6:10 PM. Second by Stark. Voice vote. Motion unanimously approved.

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Board President

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Board Secretary

*Minutes respectfully submitted by:  
Gayla Burgess, Admin Assistant to the Superintendent  
September 8, 2014*



Strategic Goal 1	Strategic Goal 2	Strategic Goal 3	Strategic Goal 4	Strategic Goal 5
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**LINN-MAR COMMUNITY SCHOOL DISTRICT  
BOARD REGULAR MEETING MINUTES – SEPTEMBER 8, 2014**

**ATTENDEES:**

- Board: Patterson, Gadelha, Wilson, Buchholz, Isenberg, Stark, Hutcheson
- Administration: Morrison, Ironside, Ramos, Anderson, Jensen, Halupnik, Mulholland
- Absent: Christian

**CALL TO ORDER AND DETERMINATION OF A QUORUM**

The Linn-Mar Community School District Board of Directors regular meeting was called to order in the Board Room of the Learning Resource Center by President Barry Buchholz at 7:00 PM. Roll was taken and it was determined a quorum was present.

**REVISION AND/OR ADOPTION OF THE AGENDA: Motion 042-09-08**

Motion by Patterson to adopt the agenda with the walk-in. Second by Gadelha. Voice vote. Motion unanimously approved.

**AUDIENCE COMMUNICATIONS**

- Melissa Glasser, 1820 Bellboy Dr, Marion, shared that the enrollment numbers and class sizes at Indian Creek Elementary are growing and an additional section of first grade was added after the start of the school year. Glasser also shared that even with the additional first grade section, the classes have 28 students per section; resulting in discipline and behavior issues. The current trend in housing construction in the Indian Creek area will continue to increase enrollment numbers and class sizes. Glasser requested the Board take the growing enrollment numbers and class sizes into consideration now so another boundary change is not needed in the near future.
- Craig Adamson, 3200 Penny Lane, Marion, thanked the Board for making a significant improvement in communication to the public regarding the focus groups led by HYA Executive Search regarding the superintendent search. Adamson shared that only five parents/guardian attended the open community forum, but he was glad that the website included the details of the forum and the online survey. Encouraged the Board to continue to promote better communication to the public; specifically on the larger issues such as the High School renovations, etc.

**RESOLUTIONS, OPENING OF BIDS, AND PUBLIC HEARINGS:** No items presented.

**RECOGNITIONS/PROCLAMATIONS:** No items presented.

## **BOARD ANNOUNCEMENTS AND REPORTS**

### **Finance/Audit Committee Report:**

Hutcheson reported on the September 2<sup>nd</sup> Finance/Audit Committee meeting, sharing that a subcommittee is being formed to review and discuss student fees including the high cost of student supply lists. Hutcheson also reminded the Board that the District audit is approaching.

### **Marion City Council Report:**

Patterson reported on the September 4<sup>th</sup> Marion City Council meeting. The meeting only had one topic that applied to the District, which was the request for a variance on the noise ordinance for Linn Grove's evening walk-a-thon scheduled from 3:30-9:00 PM on a Friday night.

### **Iowa Association of School Boards – ABLE Workshop:**

Wilson, Isenberg, and Stark shared highlights on the ABLE Workshop they attended on September 4<sup>th</sup> which was sponsored by the Iowa Association of School Boards (IASB). The workshop centered on the use of rigorous assessments to determine where changes are needed in curriculum and instruction. The workshop also included comparisons on the Iowa Assessments versus other assessments, as well as role playing and how to talk to state legislators. There is a follow up workshop being offered on October 16<sup>th</sup>.

### **Echo Hill Board Visit:**

The Board shared highlights on their first school visit to Echo Hill Elementary on September 5<sup>th</sup> and commended the staff for their enthusiasm and preparation for the visit. Patterson shared she was impressed with professionalism and how well-versed the teachers were on the benefits of assessments, as well as how testing and PLC were structured to assess data and improve teaching. Hutcheson commented that he was impressed with the role of the Instructional Strategists and how they were working to connect the curriculum across the District. Buchholz reiterated Hutcheson's thoughts and commented that it was a great avenue to assess the progress and benefits of the Teacher Leadership program.

## **INFORMATIONAL REPORTS**

### **Review of Estimated FY2015 Local Option Sales Tax:**

*Exhibit 701.1*

Linn-Mar CFO, JT Anderson, reported on the estimated FY2015 local option sales tax distribution. Estimated District total for FY15 is \$6,182,181; which is a 3.3% increase from last year. Some of the projects funded by the local option sales tax are: 1) construction of Novak Elementary, HVAC installed in two elementaries, relocation of the Transportation and O&M building, construction of the Aquatic Center, construction of the Oak Ridge gym, renovations at Wilkins and Bowman woods, the High School renovations project, and technology needs.

### **Early Literacy Grant Implementation Requirements:**

*Exhibit 702.1*

Amy Kortemeyer, Director of Elementary Teaching & Learning, shared information on the implementation requirements for the Iowa Department of Education Early Literacy Grant. The Iowa Department of Education issued a new guidance packet on August 26, 2014 regarding Early Literacy assessments. The FAST/Iowa Tier assessment is the universal screening approved for K-3. The students in the Early Childhood Blended Program (ECBP) must be assessed, now, as well.

Approximately four people from every elementary building participated in training over the summer in FAST/Iowa Tier and will share training with the staff in their buildings. FAST assessment takes about six minutes per student to administer. FAST testing dates are set by the



state. The Vendor Benchmarks are weighted by subtest categories and the time the test is administered (fall, winter, or spring). The assessment monitors: 1) students who are appropriately progressing, 2) students who are “at risk” for substantial deficiency in reading (didn’t pass in one of the testing windows), and 3) students who exhibit a “substantial deficiency” in reading (didn’t meet required benchmarks).

Kortemeyer shared that the legal requirements for Early Literacy assessment are: 1) K-3 weekly progress monitoring, 2) intensive instruction, 3) parent notification (deficiency, services, strategies, quarterly progress reports, parent contract, and notice regarding summer school), 4) 90 minutes of scientific, research-based reading instruction (uniform across the District), and reading curriculum requirements. All results/progress are monitored by the Iowa Department of Education. Also, by May 1, 2017, any third grader who is not proficient by the end of their third grade year must be retained. Question was raised as to whether or not there were additional assessments available that would help reduce the number of students needing to be retained. Kortemeyer shared that there were a lot of options that would honor the student and that she doesn’t foresee the need for many students to be retained.

Next steps are for teachers to attend webinars on FAST/Iowa Tier provided by the Department of Education, communication of Early Literacy requirements, and additional trainings on the implementation of the Early Literacy Initiative. Will assess at the end of the year to see if the FAST/Iowa Tier assessment is the best fit for the District.

#### **Home School Program Update:**

*Exhibit 703.1*

Dirk Halupnik, Deputy Superintendent, reported that 60 students turned in Form A for the Home School program with 39 students requesting enrollment. There are 41 additional students dual-enrolled for additional activities; mainly secondary students. Elizabeth (Beth) Clay was hired as the Home School teacher/facilitator and is currently contacting families to confirm their interest in the program. A family meeting was held last week with approximately 50 people in attendance. Beth is currently emailing a Friday update until the Home School website is up and running, as parents/guardians shared they prefer a website over a newsletter. Jeff Frost, Director of Home School, is working with the Marion Public Library to link the Linn-Mar Home School program with the Home School services they provide to students. Based on current enrollment figures and the historical trend of increased enrollment as the year moves forward, an additional teacher will be hired. Halupnik thanked Louanne Lawson for all the work she has done as the secretary for the Home School program. Question was raised as to whether or not the previous concern shared about overloading Jeff Frost and Louanne Lawson with Home School responsibilities on top of their other responsibilities would be addressed by the hiring of the two teachers and it was shared that the program is progressing very well and it would continue to be monitored. Question was also raised about the Home School budget and it was clarified that there are more controls in place to ensure additional issues do not arise.

#### **SUPERINTENDENT’S UPDATE**

*Walk-In Exhibit 801.1*

Mulholland, Superintendent, updated the Board on items of interest throughout the District including Board priorities and issues being decided upon on a year ago, an update on the superintendent search focus groups, that Linn-Mar has eight students listed as National Merit Semi Finalists, information about Enterovirus D68, and that an additional meeting with DLR Architects will take place regarding the High School renovations before the September 22<sup>nd</sup> Board meeting. Mulholland also reminded the Board that they would be discussing the book entitled, *Cultures Built to Last*, at the September 22<sup>nd</sup> work session.

The instructional priorities are:

- 1) Powerful instructional leadership within the learning community.
- 2) Focus on education all students: a) extra help for struggling students and b) rigorous and aligned curriculum.
- 3) Restructuring the learning environment
- 4) Build professional learning communities and effective professional development.
- 5) Use data to drive decisions.

## **OLD BUSINESS**

**Second Reading – Board Policy Series 400: Staff Personnel: Motion 043-09-08** *Exhibit 901.1*  
Motion by Patterson for the Board to approve the 400 Series policies, *Staff Personnel*, for second reading. Second by Isenberg. Voice vote. Motion unanimously approved.

**Approval of Novak Elementary Fundraising Requests: Motion 044-09-08**

Motion by Patterson for the Board to approve the Novak fundraising requests for Stride with Pride and the Hy-Vee coupon books, since previous reporting requirements were met. Second by Stark. It was shared that the previous reporting requirements had been submitted on time but were overlooked. Voice vote. Motion unanimously approved.

**PPEL to Debt Service Transfer – Bus/Lease Purchase Payment: Motion 045-09-08**

*Exhibit 903.1*

Motion by Patterson for the Board to approve the transfer of \$58,094.48 from PPEL to Debt Services for the final payment of four bus leases. Second by Hutcheson. Voice vote. Motion unanimously approved.

## **NEW BUSINESS**

**Approval of Vocal Music Trip to Portugal/Spain: Motion 046-09-08** *Exhibit 1001.1*

Motion by Patterson for the Board to approve the trip request submitted by the High School Vocal Music Department for a student trip to Portugal/Spain. Second by Stark. Voice vote. Motion unanimously approved.

**Approval of POMS Trip to Nationals: Motion 047-09-08**

*Exhibit 1002.1*

Motion by Hutcheson for the Board to approve the trip request submitted by the High School POMS for a student trip to Nationals in Orlando, Florida. Second by Patterson. Voice vote. Motion unanimously approved.

**Approval of FFA Trip to National Convention: Motion 048-09-08**

*Exhibit 1003.1*

Motion by Patterson for the Board to approve the trip request submitted by the High School FFA for a student trip to National Convention in Louisville, Kentucky. Second by Hutcheson. Voice vote. Motion unanimously approved.

**Financial Services Agreement for Private Sale of Bond: Motion 049-09-08** *Exhibits 1004.1-3*

Motion by Hutcheson for the Board to approve the execution of a financial services agreement and timeline with Piper Jaffray for the private sale of a bond in the amount of \$3.64 Million. Second by Patterson. District CFO, JT Anderson, shared that he has worked with Piper Jaffray on a proposal for the sale of a private bond to stay within bank-qualified status and that this is becoming a more common practice with surrounding school districts. A private sale of bond allows the District to work directly with local banks, allows the District to dictate who bid

packets are submitted to, has fewer fees, removes the reserve requirement for public bond sale, and receives favorable interest rates. Voice vote. Motion unanimously approved.

**Resolution for Instructional Support Levy Renewal: Motion 050-09-08**

Motion by Patterson for the Board to approve renewing the Instructional Support Levy for five (5) years *by resolution*. Second by Hutcheson. Anderson shared that the District uses the Instructional Support Levy (ISL) to generate revenue for the general fund and that the current ISL expires on June 30, 2016. All but 10 districts in the state have an ISL. If renewed by vote, 10-year extension is the maximum. If renewed by resolution, a 5-year extension is the maximum. Approximately 75% of Iowa school districts renew by resolution. Funds are used for curriculum, technology support, and co-curricular support. Linn-Mar has received approximately 3.1 million dollars through ISL. It was clarified that the current motion is to move from renewing by vote to renewing by resolution; it is not the actual resolution. Voice vote. Motion unanimously approved.

**Approval of Facility Use Agreement: Motion 051-09-08**

*Exhibit 1006.1*

Motion by Hutcheson for the Board to approve the Facility Use Agreement with the U.S. Cellular Center Arena for the May 24, 2015 graduation ceremony in the amount of \$3,000 plus the cost of arena personnel used for the event and any reimbursable expenses required for the completion of the event including advertising, stagehand, catering, and outside rentals. Second by Patterson. Voice vote. Motion unanimously approved.

**Open Enrollment Requests: Motion 052-09-08**

Motion by Patterson for the Board to approve the Open Enrollment requests as presented. Second by Isenberg. Voice vote. Motion unanimously approved.

**Denied In**

Name	Grade	Resident District	Reason
Mulengwa, Brigitte	3 <sup>rd</sup>	Vinton-Shellsburg	Late, no good cause

**CONSENT AGENDA: Motion 053-09-08**

Motion by Hutcheson for the Board to approve the Consent Agenda including the walk-in. Second by Gadelha. Voice vote. Motion unanimously approved.

**Personnel**

**Certified Staff: Assignment/Reassignment/Transfer**

Name	Assignment	Dept. Action	Salary Placement
DeVries, Beth	From HS/District P.E. Teacher to EH P.E. Teacher	September 15, 2014	Same
Gotto, Ryan	From EH P.E. Teacher To Teacher Leader – TIC	September 15, 2014	Same

**Classified Staff: Assignment/Reassignment/Transfer**

Name	Assignment	Dept. Action	Salary Placement
Adams, Lizzie	AC – Lifeguard / Aquatic Instructor	September 2, 2014	\$8.00 / \$10.00/hr
Cope, Cheryl	NS – HS General Help	September 3, 2014	Step 1
Dreyer, Kelly	EH – Part-time Gen. Ed. Assistant	September 2, 2014	I, Step 10
Ford, Karin	AC – Aquatic Instructor	September 2, 2014	\$12.00/hr

Name	Assignment	Dept. Action	Salary Placement
Johnson, Jennifer	IC – Part-time Student Support Associate	September 3, 2014	II, Step 8
Koppen, Peter	O&M – Skilled Maintenance	September 2, 2014	E, Step 1
McCoy, Theresa	OR – Student Support Associate	August 25, 2014	II, Step 10
Noeller, Steve	TR – From Substitute to Bus Driver	August 25, 2014	Step 1
Preiss, Melissa	NS – HS General Help	September 3, 2014	Step 1
Rehn, Kelsie	AC – Aquatic Instructor	September 2, 2014	\$12.00/hr
Renaud, Annette	BW – Student Support Associate	September 15, 2014	II, Step 10
Skvor, Leonard	TR – From Substitute to Bus Driver	August 25, 2014	Step 1
Trachta, Angela	EH – Part-time Gen. Ed. Assistant	August 29, 2014	I, Step 6
Witter, Sara	LG – Student Support Associate	August 18, 2014	II, Step 7

### **Classified Staff: Resignation**

Name	Assignment	Dept. Action	Reason
Braumann, Michelle	NS – HS – Lead Cook	August 22, 2014	Other Employment
Dochterman, Gavren	AC – Aquatic Instructor	August 26, 2014	Personal
Ebeling, Michael	O&M – Summer Help	August 28, 2014	Position Ended
Gardner, Gwen	AC – Lifeguard	August 26, 2014	Personal
Heslinga, Janet	NS – HS – General Help	September 30, 2014	<b><i>Retirement</i></b>
Ironside, Connor	AC – Lifeguard	August 26, 2014	Personal
Maurer, Amy	AC – Aquatic Instructor	August 26, 2014	Personal
McMurrin, Summer	HS – Student Support Associate	August 25, 2014	Personal
Poland, Shannon	LG – Student Support Associate	September 2, 2014	Personal
Velazquez, Rachel	AC – Lifeguard	August 26, 2014	Personal
Winfield, Kathleen	EH – Gen. Ed. Assistant	September 5, 2014	Personal
Wingerson, Erin	AC – Lifeguard	August 26, 2014	Personal

### **Extra-Curricular: Assignment/Reassignment/Transfer**

Name	Assignment	Dept. Action	Salary Placement
Crow, Darrin	HS – Fall Drama Director	September 8, 2014	Schedule H, Category A (1/3)
Handke, Josh	HS – Assistant Varsity Girls Track Coach	August 28, 2014	Schedule H, Category C
Hanson, John	HS – NHS Sponsor	October 1, 2014	Schedule H, Category G
Henik, Katlyn	OR – Assistant 8 <sup>th</sup> Grade Volleyball Coach	September 1, 2014	Schedule H, Category E
Welch, Jonathan	HS – Auditorium / Little Theater Manager (1/3)	August 25, 2014	Schedule H, Category A (1/3)

### **Extra-Curricular: Resignation**

Name	Assignment	Dept. Action	Reason
Crock, Molly	HS – NHS Sponsor	September 30, 2014	Personal
Meeks, Austin	HS – Head 10 <sup>th</sup> Grade Baseball Coach	August 28, 2014	Personal
Smith, Jeff	HS – Head Varsity Girls Tennis Coach	August 25, 2014	Personal

### **Approval of Minutes from August 25, 2014, including walk-in**

*Exhibit 1102.1*

### **Approval of Bills:** Special revenue, general, and nutrition fund bills.

*Exhibits 1103.1-2*

### **Approval of Contracts**

*(For student confidentiality, no exhibits provided.)*

- 1) 2014-15 contracted service for one (1) regular education student with Sioux City Community School District, Boys and Girls Home School, in accordance with the State of Iowa Department of Education.
- 2) 2014-15 Interagency Agreement for Special Education Instructional Program for two (2) students with College Community School District, in accordance with the State of Iowa Department of Education.

### **Board Information**

### **Items Removed from the Consent Agenda for Separate Action**

## **COMMUNICATIONS, ANNOUNCEMENTS, AND TRANSMITTALS**

### **Communications**

- Gadelha commented on an article in *The Gazette* that reported the benefits of delayed start times for students and that she felt good that Linn-Mar has a later start time in place for the students.
- Isenberg shared an update on the Cross Country teams stating that the first two meets went very well and that the girls' team is one of the top five in the state and there is a good chance that the boys will win state.

### **Calendar:**

- September 15<sup>th</sup> Policy Committee meeting will be rescheduled due to the Special Meeting with HYA regarding the superintendent search focus group results.
- Coffee Conversations – September 20<sup>th</sup> – Patterson will attend in place of Buchholz.

Date	Time	Event	Location
September 15	11:00 AM	Executive Committee	LRC Main Office Conf Room
September 15	5:00 PM	Policy Committee	LRC Main Office ConfRoom
September 15	5:15 PM	Special Meeting with HYA	LRC – Board Room
September 17	7:00 AM	Novak Visit	Novak Elementary
September 22	5:00 PM 7:00 PM	Board Work Session Regular Board Meeting	LRC Board Room
Date	Time	Event	Location

October 1		2014-15 Enrollment Certified	
October 3	7:30 AM	Linn Grove Visit	Linn Grove Elementary
October 6	5:00 PM 7:00 PM	Board Work Session Regular Board Session	LRC Board Room
October 7	7:30 AM	Finance/Audit Committee	LRC Main Office Conf Room
October 13	11:00 AM	Executive Committee	LRC Main Office Conf Room
October 13	5:00 PM	Policy Committee	LRC Main Office Conf Room
October 15	7:00 AM	Indian Creek Visit	Indian Creek Elementary
October 20	5:00 PM 7:00 PM	Board Work Session Regular Board Session	LRC Board Room

### Committees

- September 22<sup>nd</sup> meeting will focus on the update of committees. Mulholland requested email from Board members as to whether they will continue on current committees or if they would like to be on different committees. Buchholz shared that it is important the Board be represented on all committees.

<b>Committee</b>	<b>Participants</b>
Executive Committee	Barry Buchholz, Tina Patterson, Katie Mulholland
Finance/Audit Committee	Todd Hutcheson, Ann Stark, Elizabeth Wilson, Angie Morrison, JT Anderson
Policy Committee	Rene Gadelha, Tim Isenberg, Tina Patterson, Katie Mulholland
Career & Technical Education	Tim Isenberg, Elizabeth Wilson, Dirk Halupnik
Construction Advisory Council	Barry Buchholz, Rene Gadelha, Rick Ironside, Katie Mulholland
Energy Efficiency	Tina Patterson, Rick Ironside
Equity Advisory	Tim Isenberg, Tina Patterson, Dirk Halupnik, Jeri Ramos
Health & Human Development	Todd Hutcheson, Ann Stark, Julie Jensen
Linn-Mar Foundation	Katie Mulholland
School Improvement Advisory	Rene Gadelha, Ann Stark, Dirk Halupnik
Special Education Advisory	Tina Patterson, Elizabeth Wilson, Julie Jensen

### **ADJOURNMENT: Motion 054-09-08**

Motion by Wilson to adjourn at 8:13 PM. Second by Gadelha. Voice vote. Motion unanimously approved.

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Board President

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Board Secretary

*Minutes respectfully submitted by:  
Gayla Burgess, Admin Assistant to the Superintendent  
September 8, 2014*



Iowa Department of Revenue

Director: Courtney M. Kay-Decker  
 Hoover State Office Building  
 Des Moines, Iowa 50319  
[www.iowa.gov/tax](http://www.iowa.gov/tax)

LINN-MAR COMM SCH DIST  
 2999 NORTH 10TH STREET  
 MARION IA 52302-0000

57 DATE 08/14/2014

New Fiscal Year 2015 Estimated Local Option Sales Tax or SAVE monthly distribution payments.

The Department of Revenue is required to distribute to participating local option sales tax jurisdictions and to all school districts 95% of their estimated sales tax collections on a monthly basis. If your school district is eligible for supplemental SAVE funds those funds are included in your July 31 monthly estimated payment shown in the table below.

The Department makes a final reconciliation payment on or before November 10 following the end of the fiscal year. If an overpayment has occurred for the fiscal year, the Department will revise and lower your monthly payments beginning with the November payment in the next fiscal year.

Notify us if you become aware of changes in your business climate that will significantly impact sales tax collections during this fiscal year.

Sales Tax Period	Payment #	Mail Date	Distribution Payment	
September 30	1	August 31	489,422.64	
	2	September 30	489,422.64	
	3	October 31	489,422.65	
December 31	4	November 30	489,422.64	
	5	December 31	489,422.64	
	6	January 31	489,422.65	
March 31	7	February 28	489,422.64	
	8	March 31	489,422.64	
	9	April 30	489,422.65	
June 30	10	May 31	489,422.64	
	11	June 30	489,422.64	
	12	July 31	489,422.65	
Supplemental Estimate	12	July 31	0.00	

#### Questions, contact us.

- Estimates (515)242-6224; email Joel.Phipps@Iowa.Gov, Tax Research & Program Analysis.
- Payments (515)281-6106; email Joel.Gabrielson@Iowa.Gov, Local Government Support.

HOOVER STATE OFFICE BUILDING/DES MOINES, IOWA 50319



## IOWA DEPARTMENT OF EDUCATION

### *Early Literacy Guidance*

Updated August 26, 2014

**This document contains official guidance for §279.68. Guidance dated December 12, 2013 should not be used.**

## Purpose

The purpose of this guidance is to aid Iowa's public school districts in interpreting and implementing recently enacted Iowa Code §279.68 regarding early literacy progression. The Iowa Department of Education has also interpreted §279.68 in IAC 281—62. The requirements of Iowa Code §279.68 and IAC 281—62 apply to all public school districts in Iowa.

The general requirements of §279.68 and IAC 281—62 are: provision of universal screening in reading for students in kindergarten through third grade; progress monitoring for students who exhibit a substantial deficiency in reading; the provision of intensive instruction – including 90 minutes daily of scientific, research-based reading instruction - for students who exhibit a substantial deficiency in reading; notice to parents that a student exhibits a substantial deficiency in reading, including strategies the parents can use at home to help the child succeed; notice to parents of such a student's subsequent progress; provision of an evidence-based summer reading program for students who exhibit a substantial deficiency in reading; retention of any student who is not proficient in reading by the end of the third grade, did not attend the summer reading program, and does not qualify for a good cause exemption from the retention requirement. Some of these requirements go into effect immediately and are expected to be implemented no later than August 1, 2014. Others, such as the requirements for retention and the summer reading program, do not go into effect until May 1, 2017. Please refer to the table below for the deadline for each specific requirement.

The specific requirements and permitted actions are listed in table form along with the Iowa Code and Iowa Administrative Rule citations that apply. Further information in this document includes: Additional guidance, Frequently Asked Questions and Definitions.

## Requirements

Table 1 lists actions by public school districts that are **required** per §279.68 and IAC 281—62.



**Table 1: Code Citation, District Action Required, and Deadline.**

Item	Iowa Code citation	Iowa Administrative Code citation	Action required of district	Deadline
1	279.68(1)(a)	IAC 281—62.2	Assess all K-3 students at the beginning of the school year and intermittently throughout the year using a Department-approved universal screening assessment.	No later than August 1, 2014.
2	279.68(1)(a)	IAC 281—62.2	Provide periodic assessments of students who exhibit a substantial deficiency in reading for the purpose of progress monitoring using a Department-approved progress monitoring assessment.	No later than August 1, 2014.
3	279.68(1)(a)	IAC 281—62.2	Use Department- determined benchmarks for basic levels of reading proficiency.	No later than August 1, 2014.
4	256B	IAC 281—62.3(6)	Permit a student with a disability who has been determined to require an alternate assessment aligned to alternate academic achievement standards in reading to take an alternate reading assessment <sup>1</sup> that includes progress monitoring	No later than August 1, 2014.
5	279.68(2)(a)	IAC 281—62.6(1)	Provide intensive reading instruction, including a minimum of 90 minutes a day of scientific, research- based reading instruction, to any student who exhibits a substantial deficiency in reading. This instruction may also include but is not limited to the following strategies: <ul style="list-style-type: none"> <li>• Small group instruction</li> <li>• Reduced teacher- student ratios</li> <li>• More frequent progress monitoring</li> <li>• Tutoring or mentoring</li> <li>• Extended school day, week, or year</li> <li>• Summer reading programs</li> </ul>	No later than August 1, 2014.
6	279.68(2)(d)	IAC 281—62.6(3)	Provide a reading curriculum for students with substantial deficiencies in reading that does all of the following: <ul style="list-style-type: none"> <li>• Assists students in developing skills to read at grade level</li> <li>• Provides skill development in phonemic awareness, phonics, fluency, vocabulary, and comprehension</li> <li>• Is implemented by certified instructional staff with appropriate training and professional development</li> <li>• Is implemented during regular school hours</li> <li>• Provides a curriculum in core academic subjects to assist the students in maintaining or meeting proficiency in all subjects</li> </ul>	No later than August 1, 2014.
7	279.68(1)(a)	IAC 281—62.4(3)	Continue to provide a student who exhibits a substantial deficiency in reading with intensive reading instruction until the reading deficiency is remedied.	No later than August 1, 2014.
8	279.68(1)(a)	IAC 281—62.4(1)	In determining whether or not a student demonstrates a substantial deficiency in reading, the district shall consider whether <b>both</b> of the following apply: (1) the student's performance is below a set standard on an approved assessment and, (2) the student's progress on an approved assessment is minimal. The Department will issue specific guidance regarding the use of these criteria with all approved assessments.	No later than August 1, 2014.

<sup>1</sup> It is important to note that the alternate assessment addresses literacy, and not just reading.

Item	Iowa Code citation	Iowa Administrative Code citation	Action required of district	Deadline
9	279.68(1)(b)	IAC 281—62.4(4)	Notify the parent or guardian of any student determined to have a substantial deficiency in reading annually (1) that their student has been identified as having a substantial deficiency, (2) of the services currently provided to the student, (3) what proposed supplemental instructional services and supports the district will provide to the student to remediate the reading deficiency, and (4) strategies parents/guardians can use to help the child succeed	No later than August 1, 2014.
10	279.68(2)(b)	IAC 281—62.6(4)	Apprise the parent or guardian of any student determined to have a substantial deficiency in reading of their student's academic progress and other useful information.	No later than August 1, 2014.
11	279.68(2)(c)	IAC 281—62.6(4)	Provide the parent or guardian of any student determined to have a substantial deficiency in reading with a plan outlined in a parent contract.	No later than August 1, 2014.
12	279.68(2)(f)	IAC 281—62.6(5) IAC 281—62.10(2)	Report the following to the Department of Education: <ul style="list-style-type: none"> <li>specific reading interventions and supports implemented by the district</li> <li>data on universal screening and progress monitoring</li> </ul>	No later than August 1, 2014.
13	279.68(4)(a)	IAC 281—62.9(1)	Address reading proficiency as part of the district's Comprehensive School Improvement Plan (CSIP) using data from universal screening and progress monitoring assessments at the classroom and school levels and analyzed by other student characteristics.	No later than August 1, 2014.
14	279.68(4)(a)	IAC 281—62.9(2)	Review chronic early elementary absenteeism for its impact on literacy development as part of the CSIP.	No later than August 1, 2014.
15	279.68(4)(a)	IAC 281—62.9(3)	If more than 15% of an attendance center's students are not proficient by the end of 3 <sup>rd</sup> grade, the CSIP is required to include strategies to increase the percent proficient in reading, including school and community strategies.	No later than August 1, 2014.
16	279.68(1)(c)	IAC 281—62.5(1)	Notify the parent/guardian of a student whose reading deficiency has not been remedied by the end of 3 <sup>rd</sup> grade that they may enroll their student in an intensive summer reading program.	Beginning May 1, 2017 (unless the district applies for and is granted a waiver from the Department)
17	279.68(2)(e)	IAC 281—62.5(3)	Offer and provide an intensive summer reading program for any student who exhibits a substantial deficiency in reading. The summer reading program must meet the standards and implementation guidelines established by the Iowa Reading Research Center (IRRC).	Beginning May 1, 2017.
18	279.68(1)(c) 279.68(5)	IAC 281—62.5(2)	Retain in the 3 <sup>rd</sup> grade any student who is not proficient in reading by the end of 3 <sup>rd</sup> grade on the universal screening assessment unless the student meets any of the following criteria: <ol style="list-style-type: none"> <li>the student completed the intensive summer reading program</li> </ol>	Beginning May 1, 2017

Item	Iowa Code citation	Iowa Administrative Code citation	Action required of district	Deadline
18	279.68(1)(c) 279.68(5)	IAC 281—62.5(2)	<ol style="list-style-type: none"> <li>the student is a Limited English proficient student with less than two years of instruction in an ESL program</li> <li>the student has an IEP and the student's IEP indicates that participation in the assessments required by 279.68 is not appropriate</li> <li>the student has demonstrated an acceptable level of performance on an alternative assessment based on scientifically-based research</li> <li>the student has demonstrated mastery through a portfolio review that meets Department-required criteria</li> <li>the student was previously retained and has received intensive remediation in reading for at least two years</li> </ol>	Beginning May 1, 2017.
19	279.68(5)(b)	IAC 281—62.4(1)	Document requests for good cause exemption from retention with evidence presented by the student's teacher to the school principal that the student's promotion is appropriate and is based on the student's academic record. Evidence may include the student's IEP, report card, or portfolio.	Beginning May 1, 2017
20	279.68(1)(c)	IAC 281—62.5(3)	Continue to provide intensive reading instruction to a student who is promoted to grade four but is not yet proficient in reading until the student's reading deficiency is remediated.	Beginning May 1, 2017

## Permitted Actions

Table 2 lists actions by public school districts that are permitted per §279.68 and IAC 281—62.

**Table 2: Code Citation, District Action Permitted, and Deadline.**

Item	Iowa Code citation	Iowa Administrative Code citation	Action permitted by district	Deadline
21	279.68(5)(a)(3)	IAC 281—62.3(2)	In addition to universal screening and progress monitoring using approved assessments, the district may use an alternative assessment to determine an individual student's proficiency in reading. The alternative assessment must be based on scientifically-based research and reasonably calculated to provide information about the child's reading.	Beginning May 1, 2017
22	279.68(5)(a)(4)	IAC 281—62.3(3)	In addition to universal screening and progress monitoring using approved assessments, the district may use a portfolio review of student work to determine reading mastery. The portfolio review must use standard criteria based on scientifically-based research. The Department will maintain a list of portfolio review criteria.	Beginning May 1, 2017
23	279.68(1)(a)	IAC 281—62.3(4)	In addition to conducting universal screening and progress monitoring using approved assessments, the district may use teacher observation to determine that a student should be initially identified as having a substantial deficiency in reading proficiency. Teacher observation may not be used to determine that a student continues to have a substantial deficiency. Teacher observation must be based on Department-approved observation criteria.	Beginning August 1, 2014

Table 3 provides updated guidance for public school districts on **required** and **permitted** actions per §279.68 and IAC 281—62.

**Table 3: Item Number, District Action Required or Permitted, and Updated Guidance.**

Item	Action required of district	Guidance [Updated August 26, 2014]
1	Assess all K-3 students at the beginning of the school year and intermittently throughout the year using a Department-approved universal screening assessment.	Universal screening data are collected within Iowa TIER for districts using Formative Assessment System for Teachers [FAST]. For districts using an approved assessment other than FAST, access to Iowa TIER is not yet available. Therefore districts will be required to upload student-level universal screening data to the Department within 2-4 weeks after the close of each assessment period using a specified spreadsheet format [Fall, Winter, Spring]. Additional guidance on the required data elements and process for upload will be available by Fall 2014.
2	Provide periodic assessments of students who exhibit a substantial deficiency in reading for the purpose of progress monitoring using a Department-approved progress monitoring assessment.	<p>A student with a substantial deficiency in reading is a student whose reading performance is below a standard set on an approved assessment <b>and</b> whose progress on an approved assessment is minimal. Students are considered to have a substantial deficiency in reading when they meet either of the following criteria:</p> <ul style="list-style-type: none"> <li>• Score below the vendor benchmark during a universal screening period directly after a screening period in which they were considered at-risk of being substantially deficient.</li> <li>• Score below the vendor benchmark for two consecutive universal screening periods.</li> </ul> <p>Districts are required to monitor the progress of – and provide additional intervention for – students who struggle with reading. There are two levels of risk that require some action for individual students:</p> <ol style="list-style-type: none"> <li><b>1. Progress Monitoring and Intervention Requirements for Students Who Are Substantially Deficient</b> <ul style="list-style-type: none"> <li>• All students who are identified as substantially deficient are required to receive weekly progress monitoring. This will allow schools to monitor the improvement students are making toward end of year goals (i.e., spring benchmark) given the intervention they receive.</li> <li>• All students identified as substantially deficient are required to receive intervention to remediate their reading difficulties. This intervention is required to continue until the student demonstrates reading proficiency by meeting benchmark during a universal screening period.</li> </ul> </li> <li><b>2. Progress Monitoring and Intervention Requirements for Students Who Are At-Risk</b> <ul style="list-style-type: none"> <li>• All students who are identified as at-risk of having a substantial deficiency are required to receive weekly progress monitoring. This will allow schools to monitor the student's progress to ensure he or she is on track to meet end of the year reading goals (i.e., spring benchmarks).</li> <li>• Intervention for students who are at-risk is highly recommended. If multiple data points suggest a student is not on track to meet end of year goals (i.e., spring benchmarks), interventions should be implemented for the at-risk student.</li> </ul> </li> </ol> <p><b>Examples Across Universal Screening Periods</b></p> <p>If a student <b>met benchmark</b> on the previous universal screening assessment and on the current universal screening s/he scores...</p> <ul style="list-style-type: none"> <li>• at or above the benchmark, then s/he is not at-risk and considered appropriately progressing and no action is required.</li> <li>• below the benchmark, then s/he is at-risk for substantial deficiency in reading and weekly progress monitoring is required but no intervention.</li> </ul>

Item	Action required of district	Guidance [Updated August 26, 2014]																							
2	Provide periodic assessments of students who exhibit a substantial deficiency in reading for the purpose of progress monitoring using a Department-approved progress monitoring assessment.	<p>If a student was identified as <b>substantially deficient</b> on the previous universal screening assessment and on the current universal screening s/he scores...</p> <ul style="list-style-type: none"><li>at or above the benchmark, then s/he is at-risk for substantial deficiency in reading and weekly progress monitoring is required but no intervention.</li><li>below the benchmark, then s/he continues to be substantially deficient in reading and both weekly progress monitoring and intervention are required.</li></ul> <p>If a student was identified as <b>at-risk</b> on the previous universal screening assessment and on the current universal screening s/he scores...</p> <ul style="list-style-type: none"><li>at or above the benchmark, then s/he is no longer considered at-risk and considered appropriately progressing and no action is required.</li><li>below the benchmark, then s/he is substantially deficient in reading and both weekly progress monitoring and intervention are required.</li></ul> <p>Table 4 below provides guidance on universal screening, progress monitoring, instruction and parental notice requirements.</p> <p>Table 4. <i>Assessment and support for students who are appropriately progressing, at-risk or who exhibit a substantial deficiency in reading.</i></p> <table><tr><th></th><th>Students who are Appropriately Progressing</th><th>Students who are At-Risk for a Substantial Deficiency in Reading</th><th>Student who exhibit a Substantial Deficiency in Reading</th></tr><tr><td>Universal Screening</td><td>All students 3 x's per year</td><td>All students 3 x's per year</td><td>All students 3 x's per year</td></tr><tr><td>Progress Monitoring</td><td>Not Required</td><td>Required Weekly</td><td>Required Weekly</td></tr><tr><td>Instruction</td><td>Universal Tier</td><td>Universal Tier with additional intensive instruction <u>recommended</u></td><td>Universal Tier with additional intensive instruction <u>required</u></td></tr><tr><td>Parent Notice</td><td>District adopted process for communicating student performance and progress</td><td>District adopted process for communicating student performance and progress – Notice specific to performance on universal screening and any services to be provided is <u>recommended</u>.</td><td>District adopted process for communicating student performance and progress – Notice to parents specific to performance on universal screening, services to be provided, recommended strategies, progress, and parent contract information is <u>required</u></td></tr></table> <p>Progress monitoring data and reading interventions and supports are collected within Iowa TIER for districts using Formative Assessment System for Teachers [FAST]. For districts using an approved assessment other than FAST, access to Iowa TIER is not yet available. Therefore districts will be required to upload progress monitoring data and a list of reading interventions and supports provided to students with their Spring universal screening upload. Additional guidance on the required data elements and process for upload will be available by Fall 2014.</p>					Students who are Appropriately Progressing	Students who are At-Risk for a Substantial Deficiency in Reading	Student who exhibit a Substantial Deficiency in Reading	Universal Screening	All students 3 x's per year	All students 3 x's per year	All students 3 x's per year	Progress Monitoring	Not Required	Required Weekly	Required Weekly	Instruction	Universal Tier	Universal Tier with additional intensive instruction <u>recommended</u>	Universal Tier with additional intensive instruction <u>required</u>	Parent Notice	District adopted process for communicating student performance and progress	District adopted process for communicating student performance and progress – Notice specific to performance on universal screening and any services to be provided is <u>recommended</u> .	District adopted process for communicating student performance and progress – Notice to parents specific to performance on universal screening, services to be provided, recommended strategies, progress, and parent contract information is <u>required</u>
	Students who are Appropriately Progressing	Students who are At-Risk for a Substantial Deficiency in Reading	Student who exhibit a Substantial Deficiency in Reading																						
Universal Screening	All students 3 x's per year	All students 3 x's per year	All students 3 x's per year																						
Progress Monitoring	Not Required	Required Weekly	Required Weekly																						
Instruction	Universal Tier	Universal Tier with additional intensive instruction <u>recommended</u>	Universal Tier with additional intensive instruction <u>required</u>																						
Parent Notice	District adopted process for communicating student performance and progress	District adopted process for communicating student performance and progress – Notice specific to performance on universal screening and any services to be provided is <u>recommended</u> .	District adopted process for communicating student performance and progress – Notice to parents specific to performance on universal screening, services to be provided, recommended strategies, progress, and parent contract information is <u>required</u>																						

Item	Action required of district	Guidance [Updated August 26, 2014]
3	Use Department- determined benchmarks for basic levels of reading proficiency.	For schools using the Formative Assessment System for Teachers (FAST) and Individual Growth and Development Indicators (IGDIs) the benchmarks are programmed into the Iowa TIER data system. For schools using other department approved assessments, it is required that districts follow the benchmarks established by the test developers that are appropriate for that grade level and assessment.
4	Permit a student with a disability who has been determined to require an alternate assessment aligned to alternate academic achievement standards in reading to take an alternate assessment in addition to the universal screening and progress monitoring assessments required by 279.68 and IAC—62.	For students whose IEP identify an Alternate Assessment in reading, the state Alternate Assessment meets the universal screening and progress monitoring requirements.
5	Provide intensive reading instruction, including a minimum of 90 minutes a day of scientific, research- based reading instruction, to any student who exhibits a substantial deficiency in reading. This instruction may also include but is not limited to the following strategies: <ul style="list-style-type: none"> <li>• Small group instruction</li> <li>• Reduced teacher- student ratios</li> <li>• More frequent progress monitoring</li> <li>• Tutoring or mentoring</li> <li>• Extended school day, week, or year</li> <li>• Summer reading programs</li> </ul>	<p>For students who exhibit a substantial deficiency in reading, 90 minutes of research-based reading instruction, a district’s core literacy block satisfies the requirement to provide this service. If a district’s core instruction is not at least 90 minutes and composed of scientific, research-based reading instruction, then it is required that the district implement such a program for students with a substantial deficiency in reading.</p> <p>Districts must provide additional instruction or support to students identified as being substantially deficient in reading beyond the 90-minute requirement, which may include but is not limited to small group instruction; reduced teacher-student ratios; more frequent progress monitoring; tutoring or mentoring; extended school-day, week, or year; and summer reading programs.</p> <p>The Iowa Reading Research Center provides districts and parents resources to use specific to scientific, research-based core instruction.  <a href="http://www.iowareadingresearch.org">http://www.iowareadingresearch.org</a></p> <p>During the 2014-2015 school year, the Iowa Department of Education, in collaboration with Collaborating for Iowa’s Kids, and the Iowa Reading Research Center, will provide districts information regarding the identification of evidence-based instructional materials.</p>
6	Provide a reading curriculum for students with substantial deficiencies in reading that does all of the following: <ul style="list-style-type: none"> <li>• Assists students in developing skills to read at grade level</li> <li>• Provides skill development in phonemic awareness, phonics, fluency, vocabulary, and comprehension</li> <li>• Is implemented by certified instructional staff with appropriate training and professional development</li> </ul>	<p>The Iowa Reading Research Center provides districts and parents resources to use specific to scientific, research-based core instruction.  <a href="http://www.iowareadingresearch.org">http://www.iowareadingresearch.org</a></p> <p>During the 2014-2015 school year, the Iowa Department of Education, in collaboration with Collaborating for Iowa’s Kids, and the Iowa Reading Research Center, will provide districts information regarding the identification of evidence-based instructional materials.</p>

Item	Action required of district	Guidance [Updated August 26, 2014]
	<ul style="list-style-type: none"> <li>Is implemented during regular school hours</li> <li>Provides a curriculum in core academic subjects to assist the students in maintaining or meeting proficiency in all subjects</li> </ul>	
7	Continue to provide a student who exhibits a substantial deficiency in reading with intensive reading instruction until the reading deficiency is remedied.	Districts must continue to provide intensive reading instruction to any student who exhibits substantial deficiency until the student no longer performs below the benchmark on the universal screening measure and/or meets proficiency on the statewide accountability assessment. This includes all students, from kindergarten through twelfth grade in Iowa's public schools.
8	In determining whether or not a student demonstrates a substantial deficiency in reading, the district shall consider whether <b>both</b> of the following apply: (1) the student's performance is below a set standard on an approved assessment and, (2) the student's progress on an approved assessment is minimal. The Department will issue specific guidance regarding the use of these criteria with all approved assessments.	<p>Identification of students as having a substantial deficiency occurs when a student scores below benchmark on two consecutive universal screening administrations within or across school years. Teacher observation may be used to initially identify that a student has a substantial deficiency in reading. In the 2014-2015 school year, teacher observation may be used after the Winter universal screening period. Teacher observation may not be used to determine a student does not have a substantial deficiency in reading.</p> <p>Identification of a student as being at-risk as having a substantial deficiency occurs when a student scores below benchmark on one universal screening administration.</p> <p>A student is adequately progressing when they score at or above benchmark on two consecutive universal screening administrations within or across years.</p>
9	Notify the parent or guardian of any student determined to have a substantial deficiency in reading annually (1) that their student has been identified as having a substantial deficiency, (2) of the services currently provided to the student, (3) what proposed supplemental instructional services and supports the district will provide to the student to remediate the reading deficiency, and (4) strategies parents/guardians can use to help the child succeed	<p>Parents must be notified annually if their child(ren) is/are determined to have a substantial deficiency in reading. Identification of students as having a substantial deficiency occurs when a student scores below benchmark on two consecutive universal screening administrations within or across school years. In the 2014-2015 school year, students scoring below benchmark on both Fall and Winter [or on both Winter and Spring] universal screening administrations are considered substantially deficient in reading - and parents must then be notified as such.</p> <p>Notification letters need to include universal screening data that indicates their child(ren) is/are below benchmark, current services and proposed supplemental services that will be provided to the student to remediate substantial deficiency, and strategies parents/guardians may implement at home.</p> <p>It is strongly recommended that districts schedule Early Literacy Progression meetings with parents/guardians in order to discuss the identification of their child(ren) as substantially deficient and use this time to review the information in the letter as well as begin the process of establishing a parent contract.</p> <p>An example parent letter and contract will be provided to districts Fall 2014.</p>
10	Apprise the parent or guardian of any student determined to have a substantial deficiency in reading of their student's academic progress and other useful information.	It is recommended districts provide quarterly progress reports to parents/guardians of a child(ren) identified as substantially deficient. An example progress report will be provided to districts Fall 2014.



Item	Action required of district	Guidance [Updated August 26, 2014]
11	Provide the parent or guardian of any student determined to have a substantial deficiency in reading with a plan outlined in a parent contract.	<p>It is strongly recommended that districts schedule Early Literacy Progression meetings with parents/guardians to discuss the district process to establish a parent contract.</p> <p>An example parent letter and contract will be provided to districts Fall 2014.</p>
12	<p>Report the following to the Department of Education:</p> <ul style="list-style-type: none"> <li>specific reading interventions and supports implemented by the district</li> <li>data on universal screening and progress monitoring</li> </ul>	<p>Data regarding specific reading interventions and supports, as well as universal screening and progress monitoring data are collected within Iowa TIER for districts using Formative Assessment System for Teachers [FAST].</p> <p>For schools using Iowa TIER and the FAST assessments, required data are already documented within the system. The Universal Screening tab contains all student universal screening data. The progress monitoring tab contains all progress monitoring data and the Interventions tab allows you to save (referred to as bank within the system) interventions used and assign students to them.</p> <p>For districts using an approved assessment other than FAST, access to Iowa TIER is not yet available. Therefore districts will be required to upload a list of reading interventions and supports provided to students with their Spring universal screening upload. Universal screening data are required to be uploaded at the student-level within 2-4 weeks after the close of each assessment period using a specified spreadsheet format. Additional guidance on the required data elements and process for upload will be available by Fall 2014.</p>
13	Address reading proficiency as part of the district's Comprehensive School Improvement Plan (CSIP) using data from universal screening and progress monitoring assessments at the classroom and school levels and analyzed by other student characteristics.	The Iowa Department of Education will provide guidance on the Comprehensive School Improvement Plan by Summer 2015.
14	Review chronic early elementary absenteeism for its impact on literacy development as part of the CSIP.	The Iowa Department of Education will provide guidance on the Comprehensive School Improvement Plan by Summer 2015.
15	If more than 15% of an attendance center's students are not proficient by the end of 3 <sup>rd</sup> grade, the CSIP is required to include strategies to increase the percent proficient in reading, including school and community strategies.	The Iowa Department of Education will provide guidance on the Comprehensive School Improvement Plan by Summer 2015.
16	Notify the parent/guardian of a student whose reading deficiency has not been remedied by the end of 3 <sup>rd</sup> grade that they may enroll their student in an intensive summer reading program.	<p>It is strongly recommended that districts schedule Early Literacy Progression meetings with parents/guardians to discuss summer school options, and possible retention of their child(ren) in the 3<sup>rd</sup> grade.</p> <p>An example parent letter and contract will be provided to districts by Fall 2014.</p>



Item	Action required of district	Guidance [Updated August 26, 2014]
17	Offer and provide an intensive summer reading program for any student who exhibits a substantial deficiency in reading. The summer reading program must meet the standards and implementation guidelines established by the Iowa Reading Research Center (IRRC).	It is required to provide summer reading program options for students who have been identified as substantially deficient by the end of 3rd grade. Although this is not required until the 3 <sup>rd</sup> grade, it is recommended that districts have summer reading program options available for all students who exhibit substantial deficiency in reading until the deficiency is remediated beginning Summer 2015. Standards and implementation guidelines for summer reading programs will be provided by the Iowa Reading Research Center to districts Spring 2015.
18	<p>Retain in the 3<sup>rd</sup> grade any student who is not proficient in reading by the end of 3<sup>rd</sup> grade on the universal screening assessment unless the student meets any of the following criteria:</p> <ol style="list-style-type: none"> <li>1. the student completed the intensive summer reading program</li> <li>2. the student is a Limited English proficient student with less than two years of instruction in an ESL program</li> <li>3. the student has an IEP and the student's IEP indicates that participation in the assessments required by 279.68 is not appropriate</li> <li>4. the student has demonstrated an acceptable level of performance on an alternative assessment based on scientifically- based research</li> <li>5. the student has demonstrated mastery through a portfolio review that meets Department- required criteria</li> <li>6. the student was previously retained and has received intensive remediation in reading for at least two years</li> </ol>	As retention, and therefore good cause exemptions, will not be required until May 1, 2017, guidance will be provided to districts by Summer 2016.
19	Document requests for good cause exemption from retention with evidence presented by the student's teacher to the school principal that the student's promotion is appropriate and is based on the student's academic record. Evidence may include the student's IEP, report card, or portfolio.	As retention, and therefore good cause exemptions, will not be required until May 1, 2017, guidance will be provided to districts by Summer 2016.

Item	Action required of district [Items 21-23 are permitted actions]	Guidance [Updated August 26, 2014]
20	Continue to provide intensive reading instruction to a student who is promoted to grade four but is not yet proficient in reading until the student's reading deficiency is remediated.	Districts must continue to provide intensive reading instruction to any student who exhibits substantial deficiency until the student no longer performs below the benchmark on the universal screening measure and/or meets proficiency on the statewide accountability assessment. This includes all students, from kindergarten through twelfth grade in Iowa's public schools.
21	In addition to universal screening and progress monitoring using approved assessments, the district may use an alternative assessment to determine an individual student's proficiency in reading. The alternative assessment must be based on scientifically-based research and reasonably calculated to provide information about the child's reading.	As retention, and therefore alternative assessments, will not be required until May 1, 2017, guidance will be provided to districts by Summer 2016.
22	In addition to universal screening and progress monitoring using approved assessments, the district may use a portfolio review of student work to determine reading mastery. The portfolio review must use standard criteria based on scientifically-based research. The Department will maintain a list of portfolio review criteria.	As retention, and therefore portfolio reviews, will not be required until May 1, 2017, guidance will be provided to districts by Summer 2016.
23	In addition to conducting universal screening and progress monitoring using approved assessments, the district may use teacher observation to determine that a student should be initially identified as having a substantial deficiency in reading proficiency. Teacher observation may not be used to determine that a student continues to have a substantial deficiency. Teacher observation must be based on Department-approved observation criteria.	<p>Identification of students as having a substantial deficiency occurs when a student scores below benchmark on two consecutive universal screening administrations within or across school years. Teacher observation may be used to initially identify that a student has a substantial deficiency in reading. In the 2014-2015 school year, teacher observation may be used after the Winter universal screening period. Teacher observation may not be used to determine a student does not have a substantial deficiency in reading.</p> <p>Example teacher observation criteria will be provided to districts Fall 2014.</p>

## Frequently Asked Questions

The Frequently Asked Questions are organized in table format by major category as indicated below:

- Assessment: Universal Screening and Progress Monitoring
- Continuous Improvement
- Early Childhood
- Finance
- Intensive Intervention and Core Instruction
- Non Public Schools
- Parental Notification
- Retention
- Students receiving Special Education Services
- Substantial Deficiency
- Summer School
- Waiver

**Table 5: Question and Answer by Category**

<b>ASSESSMENT: UNIVERSAL SCREENING AND PROGRESS MONITORING</b>		
<b>No</b>	<b>QUESTION</b>	<b>ANSWER</b>
A1	Are districts required to use the state-purchased universal screening assessments and progress monitoring assessments?	No. Districts are required to use assessments that meet Department-adopted minimum standards. A list of assessments that meet Department-adopted standards are published annually on the Department's web site along with the criteria used to establish the standards. The state-purchased universal screening and progress monitoring assessments meet these criteria and are available to districts at no cost.
A2	What are the benchmarks for basic levels of reading proficiency for each grade?	Districts must follow the benchmarks established by the test developers that are appropriate for that assessment. For schools using the Formative Assessment System for Teachers (FAST) and Individual Growth and Development Indicators (IGDIs) the benchmarks are programmed into the Iowa TIER data system.
A3	What are the acceptable administration windows for universal screening assessments?	Rule 62.2 allows the Department to require universal screening assessments to be administered three times a year. The fall administration window is between the third and sixth week of the start of the school year. The winter administration window is during the first six weeks students are back after winter break. The spring administration window is generally the last four weeks of the school year.
A4	How often do districts need to monitor the progress of students with, or who are at-risk of having, a substantial deficiency in reading?	It is recommended that students should be monitored weekly if the universal screening assessment results indicate he/she has a substantial deficiency in reading. The rules allow the Department to set the standard of weekly progress monitoring for students with a reading deficiency.
A5	Can districts continue to use the assessments they already have in place in order to implement these rules?	Maybe. For the purposes of universal screening and progress monitoring, districts must use assessments that meet Department-adopted minimum standards. A list of acceptable assessments are published annually on the Department's website. This does not necessarily prevent districts from continuing to use assessments they already have in place. If the district's current assessment meets the minimum standards, it may be used for the purposes of universal screening and/or progress monitoring. If it does not, the district may still wish to use the assessment if the results answer other instructionally relevant questions.
A6	Can districts continue to use assessments they already have in place that do not meet universal screening and progress monitoring standards?	Yes, but not for the purposes of universal screening or progress monitoring.

## ASSESSMENT: UNIVERSAL SCREENING AND PROGRESS MONITORING

No	QUESTION	ANSWER
A7	What if a district uses an assessment for universal screening and progress monitoring that is not on the published list? Can the district continue to use the assessment if it meets the minimum standards outlined by the Department?	The district needs to establish that the assessment meets the minimum standards outlined by the Department. Assessments may be submitted to the Department for review within a review cycle to determine whether or not this is the case. Documentation of selected assessments meeting minimum standards must be maintained and made available to the Department upon request.
A8	What alternative assessment would be appropriate to determine proficiency in reading?	As the alternative assessment to determine proficiency is a requirement related to the retention portion of the legislation which is required May 1, 2017, guidance will be provided to districts by Summer 2016.
A9	Can districts use portfolio reviews to determine reading proficiency instead of using universal screening assessments to determine whether a student has a substantial deficiency in reading?	No. Portfolio reviews may be used along with universal screening assessments but not instead of or in place of universal screening assessments to determine whether a student has a substantial deficiency in reading. Portfolio assessments may also be used in determining whether a student should or should not be retained at the end of third grade as part of a good cause exemption.
A10	Can districts use teacher observations to determine reading proficiency instead of using universal screening assessments?	No. Teacher observation may be used for a one-time initial identification of an individual student with substantial deficiency in reading, but may not be used to determine if a student continues to have a substantial deficiency in reading.
A11	Can we implement Department approved universal screening and progress monitoring assessments to students beyond grade 3?	Yes. It is recommended that districts use appropriate assessment practices above the 3 <sup>rd</sup> grade.
A12	Can districts use other means besides universal screening assessments to determine a student has a substantial deficiency in reading?	No, with the exception of teacher observation. Universal screening assessment should be used to determine a substantial deficiency in reading; however teacher observation may be used for a one-time initial identification.
A13	Is the sole act of progress monitoring considered an intervention for at-risk students?	No. The purpose of progress monitoring is to evaluate the improvement students are making toward end of year goals given the instruction and/or intervention they are receiving. Progress monitoring is not an intervention as it is not designed to teach skills. It only measures the impact of instruction and the extent to which a student's skills are increasing.
A14	How does a parent refuse to have their child tested?	The procedures followed regarding parent refusal for district-wide assessments are local decisions.

## CONTINUOUS IMPROVEMENT

No	QUESTION	ANSWER
CI1	How shall we review “chronic early elementary absenteeism for its impact on literacy development”?	The district should review attendance data for all students in grades K-3 to determine if a pattern of frequent absences is associated with students being determined to have a substantial deficiency in reading at the individual student level.
CI2	Do we have to provide professional development to enhance the skills of elementary teachers in responding to children’s unique reading issues and needs and to increase the use of evidence-based strategies?	No. This is not required by code or rule since there have not been funds appropriated specifically for this section of the law. However, the district <u>may</u> use part or all of their portion of the \$8 million allocation for 2014-2015 to provide professional learning opportunities for teachers if they choose.

## EARLY CHILDHOOD

EC1	How does IAC 279.68 apply to prekindergarten or transitional kindergarten programs?	Iowa Code 279.68 does not apply to prekindergarten programs. However if a kindergarten age eligible child is participating in Statewide Voluntary Preschool Programs [SWVPP], the child would need to be assessed using an approved kindergarten age assessment if the district receives kindergarten funding for the child. Transitional kindergarten and kindergarten are considered kindergarten programs and must comply with expectations of IAC 279.68. If a kindergarten age eligible child is participating in SWVPP and a transitional kindergarten program, the child would be assessed using a DE approved kindergarten age assessment. Children participating in transitional kindergarten who will attend kindergarten the following year would take a DE approved kindergarten age assessment both years. It would not be appropriate to assess a child participating in a preschool program with both IGDIs and a DE approved kindergarten age assessment. Transitional kindergartens align curriculum, instruction and assessment with the kindergarten standards in the Iowa Core. Therefore, transitional kindergarten teachers would administer a DE approved assessment for kindergarten age children.
EC2	Should IGDIs be used to assess three year old children?	No, the DE did not find IGDIs to be technically adequate for use with three year old children as a universal screening measure. IGDIs assessments are identified for use with four year olds only. The DE has not identified an early literacy screening tool for use with three year old children.
EC3	How does IGDIs relate to Teaching Strategies GOLD?	GOLD and IGDIs are both components of a balanced comprehensive assessment system. One assessment does not replace the other. GOLD is required under IAC 279.60 to be administered to all preschool children enrolled in a district program. While IGDIs is a DE approved assessment, it is not mandated by state law.

## EARLY CHILDHOOD

No	QUESTION	ANSWER
EC4	We have a few transitional kindergarten classrooms in our district. If the students that attended transitional kindergarten, by 3 <sup>rd</sup> grade, are determined to be significantly behind in reading, would they be exempt from the retention rule because they had spent two years in kindergarten?	One of the good cause exemptions indicates that if a student was previously retained and has received intensive remediation in reading for at least two years, then the student is exempt from retention. If a district's defined transitional kindergarten mirrors the same structure, content and delivery of the district's defined kindergarten <sup>2</sup> a student who has attended kindergarten for two years would meet one part of this exemption. The other requirement is that the student would need to have received two years of intensive remediation. If these two requirements are met, then the student would be exempt from retention. It is important to note (1) if a district's defined transitional kindergarten is anything less or otherwise different than their defined kindergarten, then this would not meet the good cause exemption requirement of being retained for at least two years, and (2) 279.68 requires the district to continue to provide intensive instruction until the substantial deficiency is remediated, which includes grades 4 through 12.

## FINANCE

F1	In what ways can we spend the funds provided under these rules?	<p>The funds received pursuant to this section of code can be used to implement any part of Iowa Code 279.68. Examples include but are not limited to:</p> <ul style="list-style-type: none"> <li>a) obtaining assessments for universal screening and/or progress monitoring</li> <li>b) professional development around assessments, reading instruction, summer school etc.</li> </ul> <p>To access funds, districts must submit a brief application at <a href="http://www.iowagrants.gov">www.iowagrants.gov</a>. For guidance on how you might use your funds, please see the additional information provided in the Iowa Department of Education's guidance <i>Early Literacy Implementation: Budget Guidance</i>.</p>
F2	When are the state funds available for the 2014-2015 academic year?	Funds will be available as applications are received.
F3	Will the monies be there for summer school for the 2014-15 school year?	As long as Budget Guidance is followed, monies can be used per local decision. See Budget Guidance.

## INTENSIVE INTERVENTION & CORE INSTRUCTION

I1	Is the required minimum of 90 minutes daily of scientific research-based reading instruction in addition to my current literacy block for core instruction?	No. If your core literacy block for all students is at least 90 minutes and composed of scientific, research-based reading instruction, it satisfies the requirement to provide this service for all students who have a substantial reading deficiency. If your core instruction is not at least 90 minutes and composed of scientific, research-based reading instruction, then you will need to implement such a program for students with a substantial deficiency in reading. You must still provide additional instruction or support to these students beyond the 90-minute requirement, which may include but is not limited to small group instruction; reduced teacher-student ratios; more frequent progress monitoring; tutoring or mentoring; extended school-day, week, or year; and summer reading programs.
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<sup>2</sup> Kindergarten includes programming for children who are kindergarten age eligible and enrolled in any program design including those commonly referred to as "transitional kindergarten" or "junior kindergarten." These children receive K-12 student aid.

## INTENSIVE INTERVENTION & CORE INSTRUCTION

No	QUESTION	ANSWER
I2	Where can I find a list of scientific, evidence-based reading curricula and instructional materials?	The Iowa Reading Research Center, in collaboration with the Department, will be adopting standards for reading curricula and materials based on the work of the national technical assistance centers and providing a list of acceptable materials that will be published annually on the Department's web site along with the criteria used to evaluate curriculum and instructional materials.
I3	Are schools required to provide 90 minutes of research-based core reading instruction to all students?	The number of minutes specific to core reading instruction is a district decision. However it is strongly recommended that districts devote at least 90 minutes to core reading instruction for all students.
I4	How much more time beyond the 90 minutes do I need to provide to a student?	It depends on the intervention being used and what the guidelines for implementation regarding the specific intervention entail. It is important to implement the evidence-based intervention with fidelity, or in the manner the designer intended. The intensity and duration of intervention should be adjusted as needed to ensure participating students are gaining the desired improvement.
I5	Who can I count as certified instructional staff with appropriate training and professional development?	All licensed staff that have received training and professional development on the specific reading curriculum qualify.
I6	How would I determine if the reading curriculum was implemented with fidelity?	Fidelity is determined by the curriculum selected, therefore, it depends on the curriculum being used and what the guidelines for implementation entail.
I7	What subjects are covered under "core academic subjects"?	At a minimum, this includes subjects required to meet the offer and teach requirements for an elementary school [see IAC 281—12.5(3)]. The focus is providing assistance in the area of reading so that students can access all other subjects that require reading.
I8	What is the mechanism for reporting which intensive reading interventions and supports we are using?	The Department will gather information through Iowa TIER for all districts choosing to use that system. This information may also be reported in the districts Consolidated School Improvement Plan (CSIP).
I9	What is meant by an altered instructional day?	"Altered instructional day" means that the student will be provided with a minimum of 90 minutes of reading instruction in the core literacy block each day. In addition, more intensive reading intervention will be provided using time beyond the 90-minute core literacy block to successfully address the student's specific reading needs.
I10	What is meant by specialized diagnostic information?	"Specialized diagnostic information" does not imply a diagnostic test but rather the collection of additional information (e.g., through teacher observation, diagnostic teaching, classroom formative assessment, examination of student error patterns in work samples, etc.) in order to determine what specific skill(s) the student may need assistance with in order to be proficient in reading.
I11	How will I identify "reading strategies that research has shown to be successful"?	The Department will be adopting criteria by which it may be determined which are research based. The criteria have been established and will be published Fall 2014.
I12	Why aren't interventions required immediately when a child is below vendor benchmarks on an approved assessment?	It is recommended that interventions are provided immediately for students who are at-risk of having a substantial deficiency in reading. Additionally, progress monitoring data will inform schools when a child who is at-risk is not making adequate progress with current instruction to meet end of year goals.

## INTENSIVE INTERVENTION & CORE INSTRUCTION

No	QUESTION	ANSWER
I13	When should we intervene with a student who is performing within the at-risk range?	Although not required, it is recommended that supplemental interventions, be provided to students who are determined to be at-risk of having a substantial deficiency. However, it is required that these students' progress is monitored using state approved tools. This will allow the school to monitor each student's progress toward end of year goals.
I14	Can I discontinue an intervention for a student identified as substantially deficient in between benchmark periods?	No. Intervention may be discontinued when a student is no longer substantially deficient. The best measure of this status is performance during the screening periods. In most instances, the amount of time until this decision is a matter of a few weeks and it is likely most efficient to make the decision at this time.
I15	What about students who are a little bit above or a little bit below the benchmark target?	Decision making will always be least reliable at the margins (i.e., slightly above or slightly below a target). Additional caution, thought, and monitoring of student performance will be critical at these scores. These students are still identified as at-risk or substantially deficient if they score below the benchmark target.
I16	If you're doing classwide intervention as part of MTSS implementation, do you have to provide additional intervention to each student?	Yes, if that student is substantially deficient. This is true even if the classwide intervention is above and beyond core instruction.
I17	Does a classwide intervention count as an intensive intervention for students with a substantial deficiency in reading?	No. Students with a substantial deficiency in reading may participate in a classwide intervention but are required to receive additional intervention in smaller student-teacher ratio to remediate the deficiency. While a classwide intervention will be useful for buildings with many students at-risk of having a substantial deficiency in reading, these interventions are not intensive enough for students with a substantial deficiency in reading.
I18	If a school has 60 minutes of research-based reading instruction for all students and provides students with a substantial reading deficiency 30 minutes of research-based intervention that meets code requirements, have the requirement of 90 minutes of approved reading instruction been met?	It depends. Students should be provided with interventions that meet the requirements of the rule and are designed to remediate the student's reading deficiency. Research-based intervention programs provide guidance regarding implementation requirements and those should be followed. Refer to the definition of Intensive Instructional Services for more information.
I19	Can interventions for students with a substantial deficiency in reading be provided within an already-existing 90 minute literacy block?	Students with substantial deficiencies in reading should be provided with intervention in addition to the core reading instruction. When differentiation is included as part of a core program, this differentiation cannot be considered intervention for students with substantial deficiency.
I20	Can the 90 minutes include 60 minutes of classroom core and 30 minutes of intervention?	For students with a substantial deficiency in reading, at least 90 minutes of scientific, research-based reading instruction is required. These students should have access to core instruction and be provided with intensive instruction in addition to the core instruction. The specific breakdown of these minutes is a local decision. Refer to the definition of Intensive Instructional Services for more information.



## NONPUBLIC SCHOOLS

No	QUESTION	ANSWER
N1	May a nonpublic school that chooses to collect information and provide the services in Iowa Code §279.68 and IAC 281—62, though not required, send students to the public school's summer reading program?	Yes.

## PARENTAL NOTIFICATION

PN1	How often do schools need to apprise the parent or guardian of the student's academic progress?	Information showing the student's progress on a valid and reliable progress monitoring assessment should be provided to parents at least quarterly.
PN2	Will the Department provide an example of what needs to be in the "parental contract"?	Yes. An example parental contract will be provided to districts Fall 2014.
PN3	What is meant by "participation in regular parent-guided home reading"?	Guidance for parents to assist their children at home will be provided by the Iowa Reading Research Center along with activities parents can implement with their children to assist them in reading.
PN4	At what point in the year are parents notified of a substantial deficiency?	Parent notification is required within a reasonable period (e.g. within two weeks) of the universal screening in which the substantial deficiency is initially determined. Additionally, schools are encouraged to notify parents of students who are determined to be at-risk.
PN5	How are universal screening and progress monitoring data, as well as parent notices and related information, documented? Does this information go into the student's cumulative file?	Universal screening and progress monitoring data, as well as parent notices and related information, are required to be kept by districts. How districts store these data is a local decision, as long as they are maintained in a reasonable manner.
PN6	When will sample parent forms be available?	Parent forms will be available Fall 2014. It is important to note that districts will not be required to contact parents regarding substantial deficiency until after the Winter universal screening window. Please see guidance regarding substantial deficiency.
PN7	The law indicates we are to report progress to parents quarterly, however our school is on a trimester schedule. Do we report progress quarterly or on a trimester schedule?	Districts on a trimester schedule may report progress to parents on a trimester schedule.

## RETENTION

No	QUESTION	ANSWER
R1	How would I use additional factors like “student’s progress in other subject areas, as well as, the student’s overall intellectual, physical, emotional, and social development?”	These additional factors might be used to aid district staff in making a decision to retain or promote a student where they are relevant to the individual student’s situation.
R2	IDOE Early Literacy Guidance document (p.5) indicates that universal screener would be used for determining retention (see also Line 11). So is this the guidance to go by or will it be based on the state test?	Districts may use either the State assessment or the universal screening assessment to demonstrate proficiency at the end of third grade. One consideration is that the data must be available at the end of third grade before the school year is out In order to determine if a student has or has not met proficiency.
R3	If a student is still deficient in 4th grade or up, are they subject to the retention policy set by the state, or is that only for 3rd grade?	No. Note that the district is required to continue reading intervention until the deficiency is remediated.
R4	What will be the response by LEAs/state if parents refuse to agree to retention or summer school?	The procedures followed regarding parent refusal are local decisions.
R5	Does the exemption related to students with IEPs apply to all students with IEPs or only those who currently take the Alternate Assessment?	This exemption applies only to students whose IEP indicates they are participating in the Alternate Assessment.
R6	Will there be an example exemption letter from the Department?	Yes. An example exemption letter will be provided by Summer 2016.
R7	How will districts file Good Cause Exemptions with the Department?	Additional guidance related to the retention portion of the legislation will be coming in the future.
R8	If a student is substantially deficient and retention is recommended, does the student repeat '3rd grade' reading AND 3rd grade math, science, and so on?	Districts are required to retain in the 3 <sup>rd</sup> grade any student who is not proficient in reading by the end of 3 <sup>rd</sup> grade unless the student meets good cause exemption criteria. This includes all areas within the 3 <sup>rd</sup> grade curriculum.

## RETENTION

No	QUESTION	ANSWER
R9	What happens if a student moves to Iowa only in 3 <sup>rd</sup> grade and is not meeting benchmark in fall and winter - Could they be retained?	Yes.
R10	What happens if a student is in Iowa in kindergarten but then moves out for a while and comes back in 3 <sup>rd</sup> grade – can they be retained?	Yes.

## STUDENTS RECEIVING SPECIAL EDUCATION SERVICES

SE1	Are students with IEPs exempt from universal screening and progress monitoring?	<p>No. Students with IEPs must also be given universal screening and progress monitoring assessments. This includes the requirement of weekly progress monitoring, if the student is identified by screening as at-risk or substantially deficient</p> <p>A student with an IEP that designates that he or she is to take an alternate assessment instead of the universal screening and progress monitoring of reading required by these rules is to take the alternate assessment required by the IEP. That alternate assessment may be IEP progress monitoring of instruction in literacy or pre-literacy skills. It is not enough that a child's IEP requires an alternate assessment. The IEP must (1) specifically mention the universal screening and progress monitoring of reading required by these rules, (2) state why they are inappropriate for the particular child, and (3) describe the alternate methods of assessing progress.</p>
SE2	Are students with IEPs exempt from the retention requirements?	<p>Not necessarily. A student who has an IEP that specifies participation in the assessments required by these rules is not appropriate (i.e. that student should take an alternate assessment) is exempt from the retention requirement. Any other student with an IEP is not exempt unless they meet one of the other good cause exemption criteria. Note that even if the student's IEP specifies that participation in the assessments required under this section of code is not appropriate, that student must still be assessed using an alternate assessment. Students with IEPs are not exempt from being assessed.</p>
SE3	What does this mean for students who currently receive IEP services in the area of reading? Do these rules apply to them?	<p>Yes. When a student receives special education services in the area of reading they are already receiving both intervention and progress monitoring services. Additionally, all students are general education students. Some also receive services through special education because of a disability and related needs. Students with reading IEP services already receive both intervention and progress monitoring services. These students should be able to take advantage of all appropriate services available to readers in the building, including those implemented as a result of the Early Literacy Progression law. Additionally, weekly progress monitoring is required of all students who are identified as at-risk or substantially deficient on the universal screening assessments, regardless of special education eligibility. Therefore, a student with an IEP may need to be more frequently monitored on his reading IEP goal than is required per the IEP in order to meet the requirements of the Early Literacy Progression rule.</p>

## STUDENTS RECEIVING SPECIAL EDUCATION SERVICES

No	QUESTION	ANSWER
SE4	Should we suspect a disability for a child who is at-risk for having a substantial deficiency in reading?	A disability can be suspected at any time. A public agency may suspect a child might have a disability when the child's performance is below the universal screening benchmark and the child is unique in the setting in their performance level. Universal screening data of all students are needed to make this judgment.
SE5	After providing intervention and progress monitoring, at what point do we decide that we suspect a student may have a disability?	A disability can be suspected at any time. Commonly, a disability may be suspected if, a student has been provided with general instruction plus research-based supplemental instruction with sufficient frequency and duration and progress monitoring data indicate that progress is not sufficient to meet end of the year goals.
SE6	Can the specially designed instruction of an IEP be considered the intensive intervention and count towards the 90 minutes?	For students with IEPs and reading goals, IEP teams determine the specially designed instruction needs related to reading, including intervention needed in addition to core reading instruction. This includes both supports needed to access core instruction within the 90 minutes, as well as interventions needed to remediate skill deficiencies.
SE7	How does a student's progress monitoring data help determine if the student has a substantial deficiency?	Only scores on the universal screening assessment is used to determine status as at-risk or as having a substantial deficiency in reading. Progress monitoring data inform the need for intervention for students who are at-risk and may inform decisions regarding intervention effectiveness for students receiving interventions.
SE8	Can accommodations be made when testing IEP students?	Accommodations related to a student's disability are decided by the IEP team. Accommodations are provided that allow students to access the assessment while holding the purpose of the assessment constant. For example, on the Iowa Assessments, it is inappropriate to read the reading portion of the test to students as an accommodation because it changes the test from an assessment of reading skills to a listening comprehension assessment. Similarly, with a reading fluency assessment, it is inappropriate to either read the assessment to the student or change the nature of the timing of the assessment, as those modifications alter the ability to assess the student's reading fluency.

## SUBSTANTIAL DEFICIENCY

No	QUESTION	ANSWER
SD1	Does a district have to provide intensive reading instruction to students who are at-risk of having a substantial deficiency in reading?	Intervention for students who are at-risk is highly recommended. If multiple data points suggest a student is not on track to meet end of year goals (i.e., spring benchmarks), interventions should be implemented for the at-risk student.
SD2	The law says that a district must provide a student with intensive reading instruction until the reading deficiency is remedied: what does 'remedied' mean?	Remedied means the student no longer performs below the benchmark on the universal screening measure for two consecutive periods and/or meets proficiency on the statewide accountability assessment.

## SUBSTANTIAL DEFICIENCY

No	QUESTION	ANSWER
SD3	How should we use progress monitoring information? It seems like decisions are all based only on the universal screening data.	For the purposes of identification of a student for substantial deficiency in the early literacy application, universal screening data is the primary indicator. For students identified as at-risk, progress monitoring data can be used to help identify the student as needing intervention if they are not already receiving intervention. Additionally, for all students receiving intervention, progress monitoring should be used to monitor the student's improvement toward end of year goals (i.e., spring benchmark) given the intervention they receive.
SD4	Do we only consider the universal screening periods within the current school year to determine at-risk or substantial deficiency?	No. Decisions related to substantial deficiency or being at-risk are made by examining scores at adjacent universal screening periods. This applies both within and across school years. For example, a student who was identified as being at-risk of having a substantial deficiency in the spring may be identified as having a substantial deficiency once fall universal screening occurs if the student scores below benchmark in the fall.
SD5	Can the labels of at-risk and substantially deficient be applied to grades above third grade?	Schools are encouraged to use the same, good instructional practices above 3rd grade. The legislation applies to only grades K-3. However, students who are substantially deficient at the end of grade three are required to continue receiving intervention and progress monitoring until they are proficient readers.
SD6	If we use 2 of the approved universal screening assessment and a student scores above benchmark target on one and below on the other, which should we use?	If a student meets the target on an approved assessment, you can consider the student as one who met the target. In these situations, it is recommended that you use other information available to estimate the student's risk for reading success. It may be advantageous to monitor the student's progress for a brief period of time to determine if the student is on-track with reading skills or may need additional intervention.
SD7	If I can retest a student during the universal screening period, can I retest all students whose scores are below the benchmark?	No. Retesting students is only appropriate in rare and unusual circumstances where the validity of the results are suspect. Unless these types of circumstances exist, students should only be assessed once during a screening period.

## SUMMER SCHOOL

SS1	Do students who are identified as at-risk in the spring need summer school?	Although not required, summer school would be an excellent intervention opportunity for students who are identified of being at-risk of having a substantial deficiency.
SS2	During summer school sessions, which grade level of progress monitoring materials should be used?	Use the grade level material for the grade just completed.
SS3	Do retention requirements apply to students who attend summer school at the end of third grade?	Yes.
SS4	Can parents indicate they do not want their child to participate in the summer program?	The procedures followed regarding parent refusal are local decisions.

## SUMMER SCHOOL

No	QUESTION	ANSWER
SS5	If there is a summer school program for special education students, can the non-proficient students be blended into this program? Can funds be blended?	Extended School Year services are designed to meet specially designed instruction needs of a student based on his or her disability. These interventions may or may not include interventions that meet the requirements of summer school for students with a substantial deficiency in reading. Funds for both special education and the early literacy progression rule are required to be used for their purposes.
SS6	Is the Intensive Summer Reading requirement only for 3rd grade students that are deficient or all students that are deficient?	The requirement for summer school is only related to third grade students. Other summer school offerings are a local decision.
SS7	What are the requirements for transportation of students to the summer reading program (for public and nonpublic students)?	The legislation does not address transportation for summer reading programs. This is a local decision.
SS8	Previous guidance indicates that a non-public school that is doing the progress monitoring and following the ELI law can attend summer school in a public school. Who pays for that?	Yes, non-public school students may attend the intensive summer reading program(s) offered by public schools. The public school district is responsible for funding non-public and public school students in district who attend the intensive summer reading program(s) required by 279.68.
SS9	How do I qualify for a waiver of the summer reading program requirement in 2017?	Waiver applications will be reviewed on a case-by-case basis and must demonstrate a good faith effort in implementing a summer reading program along with plans for future implementation of a program within a year.
SS10	Can I get a waiver for more than one year?	No.
SS11	If I didn't apply for a waiver in 2017, may I apply for a waiver in a future year?	No.

## Definitions

*Alternate assessment* – An assessment provided to a student with a significant cognitive disability pursuant to his or her IEP in addition to universal screening and progress monitoring assessments. In most states, less than one percent of the student body take such assessments. The alternate assessment in this case is aligned to alternate academic achievement standards in reading.

*Alternative assessment* – An assessment provided to a student based on the unique facts of the student's case to help determine his or her proficiency in reading. The alternative assessment is given in addition to universal screening and progress monitoring assessments, must be based on scientifically-based research, and must be reasonably calculated to provide information about the student's reading skills.

*Approved assessment* – An assessment that appears on the Iowa Department of Education's annually updated list of assessments determined to meet the standards appropriate for the purposes of universal screening and progress monitoring; OR an assessment that meets Department-adopted minimum standards for validity and reliability at the appropriate grade level and for the appropriate skills assessed. In addition, universal screening measures must meet minimum standards for area under the curve, sensitivity, and specificity; progress monitoring measures must meet minimum standards for number of available forms of demonstrated equivalence and reliability of slope.

*Area under the curve* – A statistical measure used to gauge how accurately an assessment identifies students in need of assistance. It is derived from Receiver Operating Characteristic curves (ROC) and is presented as a number to 2 decimal places.

*Assessment* – A process to determine how a child functions by having him or her perform a selected sample of actions that are representative of the desired content.

*At-risk Reader* - Students are considered at-risk of having a substantial deficiency in reading when they meet either of the following criteria:

- A. Score below the vendor benchmark during a universal screening period for the first time.
- B. Have been previously identified as substantially deficient and then meet the vendor benchmark during the next universal screening period.

*Benchmark* – Performance on an assessment that is compared to a criterion of acceptable performance.

*Chronic early absenteeism* – The extent to which a student in Kindergarten through third grade is frequently absent from school.

*Classwide intervention* - An intervention/program that includes one or more foundational literacy skills (print concepts, phonological awareness, alphabet knowledge, phonics/decoding, irregular/sight words, fluency, oral language, vocabulary, comprehension, spelling and writing) implemented to an entire class of students. This would be implemented in addition to core literacy instruction.

*Comprehension* – Constructing meaning from text by accessing prior knowledge, understanding vocabulary and concepts, making inferences, and forming connections between critical ideas.

*Core Curriculum [or Universal Curriculum]* - The body of knowledge and skills that all students are expected to learn, as well as the materials used to engage students in learning. Curriculum can be specific knowledge and learning processes. In Iowa, curriculum must be aligned with the Iowa Core.

*Core Instruction [or Universal Instruction]* - The course of study, instruction and assessment deemed critical for student success. Universal instruction in Iowa must align with the Iowa Core, the state adopted standards that outline what educators are expected to teach and students are expected to learn.

*Evidence-based practice* – A practice that has been established as being effective through scientific research that conforms to a set of explicit criteria as defined by the Elementary and Secondary Education Act (ESEA).

*Fluency* – Reading text at an appropriate rate, with appropriate accuracy and expression.

*Forms of demonstrated equivalence* – Alternate forms need to be of equivalent difficulty to be useful as a progress monitoring tool. Having many forms of equivalent difficulty allows a teacher to determine how the student is responding to instruction because the change in score can be attributed to student skill versus a change in the measure. Approaches typically used to determine this are:

- Readability formulae (e.g., Fleish-Kincaid, Spache, Lexile, FORCAST)
- Equipercentiles
- Euclidian Distance
- Item Response Theory
- Stratified Item Sampling

*Intensive instructional services* – Intensive instructional services typically include some combination of increased time, more explicit instruction, enhanced instructional routines, more opportunities for students to respond and practice, enhanced feedback techniques, focus on a smaller number of teaching objectives at a time and smaller student to teacher ratios. Intensive instruction is aligned with each individual student's educational needs. Students with similar needs can receive group instruction, but each student receives what he or she needs. Instruction is provided in addition to the universal instruction that all students receive.

*Multi-tiered System of Supports* – MTSS is a process by which schools use data to identify academic and behavioral needs of students, match student needs with evidence-based instruction and interventions, and monitor student progress to improve educational outcomes. *Parent-guided home-reading* – Parents working directly with their child at home, on specific reading skills that have a high likelihood of leading to improved outcomes.

*Phonemic awareness* – The ability to identify, produce, and manipulate individual sounds in words.

*Phonics* – The ability to apply knowledge of letter-sounds correspondences and spelling patterns to read words.

*Portfolio review* – Assessment of performance conducted by reviewing a sample of a student's work.

*Reading Proficiency* – Minimum level of acceptable student performance on an assessment.

*Progress monitoring* – Routine checks of the learning growth (i.e., rate of progress) a student demonstrates. In order to assess students' learning frequently, progress monitoring is typically conducted once a week.

*Reading or reading readiness* – Having the necessary reading skills as measured by proficiency on the statewide test and/or meeting benchmark on the universal screening assessments.

*Reliability* – The stability of a score across different forms, items, time or observers.

*Reliability of slope* – A statistical measure that tells us how accurately the slope represents a student's rate of improvement. Two criteria are used:

- Number of observations, or student data points, needed to calculate slope.
- Coefficients for reliability for slope. This should be reported via HLM (also called LMM or MLM) results. If calculated via OLS, the coefficients are likely to be lower<sup>3</sup>

*Research-based practices* – Strategies or programs which rely on evidence-based studies that have yet to compile specific evidence for that particular practice, as defined by the ESEA.

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<sup>3</sup> HLM=Hierarchical Linear Modeling; LMM=Linear Mixed Modeling; MLM=Multilevel Modeling; OLS=Ordinary Least Squares



*Scientific, research-based reading instruction* – Instruction carried out with fidelity that is based on scientifically- based reading research as defined in the ESEA as reauthorized in 2002. Per that definition, 'scientifically-based reading research' means research that:

- applies rigorous, systematic, and objective procedures to obtain valid knowledge relevant to reading development, reading instruction, and reading difficulties; and
- includes research that-
  - employs systematic, empirical methods that draw on observation or experiment;
  - involves rigorous data analyses that are adequate to test the stated hypotheses and justify the general conclusions drawn;
  - relies on measurements or observational methods that provide valid data across evaluators and observers and across multiple measurements and observations; and
  - has been accepted by a peer-reviewed journal or approved by a panel of independent experts through a comparably rigorous, objective, and scientific review.

*Sensitivity/Specificity* – A statistical measure that gauges how accurately a tool identifies students in need of assistance.

*Substantial deficiency in reading* –A student with a substantial deficiency in reading is a student whose reading performance is below a standard set on an approved assessment **and** whose progress on an approved assessment is minimal. Students are considered to have a substantial deficiency in reading when they meet either of the following criteria:

1. Score below the vendor benchmark during a universal screening period directly after a screening period in which they were considered at-risk of being substantially deficient.
2. Score below the vendor benchmark for two consecutive universal screening periods.

*Teacher observation* – An assessment procedure in which information is collected by watching and recording characteristics of individuals or environments.

*Universal screening* – A brief assessment that is done with all students in a grade or school to determine which students are on track for proficiency and which need additional, perhaps more intensive, instruction.

*Validity* – The extent to which a test measures what it purports to measure.

*Vocabulary* – Oral vocabulary includes words that are understood through listening and speaking, while reading vocabulary includes words that are understood when reading text.

## Contacts

If you have additional questions please contact Amy J. Williamson at [Amy.Williamson@iowa.gov](mailto:Amy.Williamson@iowa.gov) or Thomas Mayes at [Thomas.Mayes@iowa.gov](mailto:Thomas.Mayes@iowa.gov).



Inspire Learning. **Unlock Potential. Empower Achievement.**

Kathleen Mulholland, Ed.D  
Superintendent

Dirk Halupnik, Ed.D  
Deputy Superintendent  
Chief Academic Officer

J.T. Anderson  
Chief Financial Officer

Karla Christian  
Executive Director of  
Human Resources

Julie Jensen  
Executive Director of  
Student Services

Rick Ironside, Ed.D  
Executive Director of  
Support Services

Jeri Ramos  
Executive Director of  
Technology Services

Angie Morrison  
Business Manager

Barry Buchholz  
President  
Board of Directors

DISTRICT SCHOOLS  
High School, 9-12  
Jeff Gustason, Ph.D.  
Principal

Excelsior, 6-8  
John Christian  
Principal

Oak Ridge, 6-8  
Erica Rausch  
Principal

Bowman Woods, K-5  
Tina Monroe  
Principal

Echo Hill, ECBP/PK-5  
Dan Ludwig  
Principal

Indian Creek, K-5  
Marilee McConnell  
Principal

Linn Grove, ECBP/PK-5  
Chad Schumacher  
Principal

Novak, ECBP/PK-5  
Carol O'Donnell  
Principal

Westfield, K-5  
Ed Rogers  
Principal

Wilkins, K-5  
John Zimmerman  
Principal

To: Dr. Katie Mulholland  
From: Dr. Dirk Halupnik  
RE: Home School Program

9/2/14 Home School Program Update

## Numbers

60 students have turned in a Form A

- 39 want HSAP
- 41 are dual-enrolled for activities or classes

## Hiring

Beth Clay has been hired as teacher/facilitator

- Responsibilities will include:
  - Contacting everyone on our list of potential HSAP families
  - Creating office hours
  - Managing the website- we will use this as our source of information in lieu of the newsletter
  - Library material checkout
  - Answer family questions
  - Serve as the actual resource teacher

## Additional Items

- It is likely with the numbers that we have that we will be hiring a 2<sup>nd</sup> teacher to assist
- A meeting was held on Thursday, September 4<sup>th</sup> with families for informational/introductory purposes.
- Jeff Frost has been working with Beth Calhoun at the Iowa DOE
- Jeff Frost and Beth Clay have been working on organizing the Resource Library per Iowa code
- Jeff Frost has met with Dawn Kline from the Marion Public Library to discuss resources available for our families that have never been utilized



# Inspire Learning. Unlock Potential. Empower Achievement.

## Superintendent's Report

### Board of Education

September 8, 2014

#### One Year Ago:

Oak Ridge Gym – The first meeting was held with DLR to review the concept drawings for Oak Ridge's second gym. Present at the meeting were: Erica Rausch, Travis Axeen, Dirk, J.T., Katie.

High School Renovation – The High School Reno Steering Committee (Dirk, Jeff Gustason, Jeff Frost, Kim Buelt, Mark Hutcheson, Katie) met to identify major concepts for the DLR charettes to be held later with staff and students. Listed were: two main entrances (convenient to parking), re-appropriating space use, satellite cafés, different media center configuration, traffic flow (especially 4 Corners), and teachers' offices. Another meeting was scheduled for September 13<sup>th</sup> to complete discussion of topics for the charette.

#### SG #4 Community Engagement

- Superintendent Search Consultant Focus Groups** – The superintendent search consultants, Dr. Ted Blaesing and Dr. David Vick, met with 23 groups, 8 individuals, and held an open forum for teaching staff and an open forum for the community to gather feedback for the superintendent search. The individual and group meetings were held on Thursday and Friday, September 4<sup>th</sup> and 5<sup>th</sup>. The open forums were held at 5:00 p.m. (teachers) and 7:00 p.m. (community) on Thursday, September 4<sup>th</sup>. The groups included representatives of students, employees, parents, volunteers, community, clergy, business, higher education, government officials, and the Linn-Mar Booster Club and Foundation. Dr. Blaesing will meet with the Board in a special meeting on Monday, September 15<sup>th</sup> at 5:15 p.m. in the Board room to share the results of the community survey and feedback gathered at the September 4<sup>th</sup> and 5<sup>th</sup> meetings.

#### SG #1 Student Achievement

- National Merit Semi Finalists** – Eight students received notice that they met the criteria to be National Merit Semi Finalists. To move into the Finalist category, they have to complete several requirements including taking the SAT. There is an embargo on publicizing their names until Wednesday, September 11<sup>th</sup>. Other Iowa schools with National Merit Semi Finalists are:

Iowa City West – 19  
 Ames – 14  
 West Des Moines Valley – 12  
 Linn-Mar – 8  
 Iowa City City High – 8  
 Cedar Rapids Washington – 8  
 Des Moines Roosevelt - 6  
 Pleasant Valley – 5  
 Dubuque Senior – 4  
 Johnston – 4

- Instructional Focus** – At the August 26, 2013 Board Work Session, the Board reviewed the Instructional Focus Priorities that were set in 2009. As a result of their discussion the following priorities were set:

June 2009 Rank		August 2013 Rank	
1	Powerful instructional leadership within a leaning community	1	Powerful instructional leadership within the leaning community
2	Focus on educating all students	2	Focus on educating all students <ul style="list-style-type: none"> <li>• Extra help for struggling students</li> <li>• Rigorous and aligned curriculum</li> </ul>
2	Restructuring the learning environment	3	Restructuring the learning environment
4	Effective professional development	4	Build professional learning communities and effective professional development
5	Build a professional community	5	Use data to drive decisions
6	Rigorous and aligned curriculum		
7	Extra help for struggling students		
8	Use data to drive decisions		

4. **Enteroviruses and Enterovirus D68** – Julie Jensen has provided an informative list of talking points regarding the Enteroviruses and Enterovirus D68. This has been given to all the schools health offices and will be posted on the web site. The Talking Points list, from the Iowa Department of Education, is attached.

**Strategic Goal #2 Learning Environments**

5. **High School Renovation Project** – Dirk has set up a meeting for next Thursday, September 12<sup>th</sup>, with DLR to review the updated renovation plans in preparation for their presentation at the September 22<sup>nd</sup> Work Session. Kim Buelt, Dirk and I will travel to the DLR offices in Des Moines for a 10:00 a.m. meeting.

**Strategic Goal #2 Staff Development**

6. **Reminder: September 22 Work Session Discussion** – Cultures Built to Last: Systemic PLCs at Work by Richard DuFour and Michael Fullan

## **Talking Points: Enteroviruses and Enterovirus D68**

### **9.8.14**

#### **Enteroviruses**

- Enteroviruses are very common viruses; there are more than 100 types.
- It is estimated that 10 to 15 million enterovirus infections occur in the United States each year, usually in the summer and fall.
- Most people infected with enteroviruses have no symptoms or only mild symptoms, but some infections can be serious.
- Enterovirus D68 (EV-D68) is one of the more than 100 types of enteroviruses circulating in the U.S. and around the world.

#### **EV-D68 Symptoms and Treatment**

- EV-D68 usually can cause mild to severe respiratory illness.
- Respiratory symptoms such as coughing and wheezing typically come on quickly.
  - Some people with severe respiratory illness caused by EV-D68 may need to be hospitalized and receive intensive supportive therapy. Infants, children, and teenagers with a history of asthma or those who have a condition that compromises their immune system, are most likely to become severely ill.
- There is no specific treatment, such as an anti-viral medication, for EV-D68 infections.
- Many infections resolve on their own and require only treatment at home:
  - Drink plenty of fluids
  - Rest
  - Stay home so you do not spread the virus to others.
  - Clean frequently touched surfaces to stop the spread of the virus at home.

#### **Guidance to Parents**

- Parents of children with cold-like symptoms that experience difficulty breathing should contact their health care provider.

#### **Prevention**

- There are no vaccines for preventing EV-D68 infections.
- Ways to help reduce the risk of getting infected with EV-D68:
  - Wash hands often with soap and water for 20 seconds.
  - Avoid touching eyes, nose and mouth with unwashed hands
  - Avoid kissing, hugging, and sharing cups or eating utensils with people who are sick
  - Disinfect frequently touched surfaces, such as toys and doorknobs, especially if someone is sick

#### **Surveillance**

- There will not be a daily count of cases as EV-D68 is not a reportable disease in the United States. Also, CDC does not have a surveillance system that specifically collects information on EV-D68 infections.





## INDEX OF POLICIES

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Reviewed 9/14	401	Equal Employment Opportunity
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Reviewed 9/14	401.2	Definition of Licensed Personnel
Reviewed 9/14	401.3	Licensed Employee Continuing Contracts
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Revised 9/14	401.11	Tutoring
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Revised 9/14	403.7-R2	Administrative Regulations Regarding Licensed Employee Family and Medical Leave Definitions
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New 9/14	New	Pregnancy Discrimination



## PERSONNEL

Policy Title STATEMENT OF GUIDING PRINCIPLES

Code 400

The goal of the Linn-Mar Community Schools is quality education. Employees provide a variety of important services for the children of the school district community. They may be teaching or assisting in the classroom, coaching or directing students, working in the office, maintaining the facilities, driving or repairing the school buses, or cooking lunches. Each employee plays a vital role in providing an equal opportunity for a quality education for students commensurate with the students' individual needs. While the teachers have the most direct impact on the formal instruction of students, all employees have an impact on the school environment by their dedication to their work and their actions. As role models for the students, employees shall promote a cooperative, enthusiastic, and supportive learning environment for the students.

In striving to achieve a quality education program, the Board's goal is to obtain and retain qualified and effective employees. The Board shall have complete discretion to determine the number, the qualifications, and the duties of the positions, and the school district's standards of acceptable performance. It shall be the responsibility of the superintendent to make recommendations to the Board in these areas prior to Board action. The Board recognizes its duty to bargain collectively with duly certified collective bargaining units.

Board policies in this series relating to general employees shall apply to employees regardless of their position as a licensed employee, classified employee, or administrator. Board policies relating to licensed employees shall apply to positions that require a teaching license or administrator's certificate or other professional license, certificate or endorsement, unless administrative positions are specifically excluded from the policy. Classified employees' policies included in this series shall apply to positions that do not fall within the definition of licensed employee.

*Deleted 9/2014*

Adopted 6/15/70 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13 Revised 5/01; 11/7/05

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title EDUCATIONAL/EMPLOYMENT EQUITY Code 400.1

The Linn-Mar Community School District shall provide equal educational and employment opportunities and will not illegally discriminate on the basis of race, creed, color, religion, gender, age, national origin, marital status, sexual orientation, gender identity, disability, veteran status, or genetic information in its educational programs and activities or in its employment and personnel policies and practices.

This district shall provide educational programs and activities which include curricular and instructional resources which reflect the racial and cultural diversity present in the United States and the variety of careers, roles, and life styles open to both men and women in our society. These programs and activities shall foster respect and appreciation for the cultural diversity found in our country, an awareness of the rights, duties, and responsibilities of each individual as a member of a pluralistic society, and reduce stereotyping and bias on the basis of race, creed, color, religion, gender, age, national origin, marital status, sexual orientation, gender identity, covered military veteran, disability, genetic information, familial status, physical attribute, political belief/party preference, or socio-economic status.

The district shall take affirmative action in recruitment, appointment, assignment, and advancement of women and men, minorities, and disabled.

A fair and supportive environment will be provided for all students and employees regardless of their race, creed, color, religion, gender, age, national origin, marital status, sexual orientation, gender identity, disability or genetic information.

Employees shall be given notice of this policy annually. It shall also be given to job applicants and disseminated to students, parents, etc., through district publications.

Page 1 of 2

Adopted 7/9/81 Reviewed 07/05; 12/11/2/14; 9/8/14 Revised 8/07; 2/09; 2/10; 1/11; 4/15/13

Related Policy: (Code Number) 401.1, 403.11

Legal Reference: (Code of Iowa) Chapters 20, 70, 601A, §§19B.11, 278.8, 29 USC

§§621-634; 42 USC §§2000e et seq.; 281 IAC 11.4, 12.4, 84-88, 95;  
Vietnam Era Veterans Readjustment Assistance Act (1974), as  
amended, 38 U.S.C. 4212; Age Discrimination in Employment Act  
(1967); Equal Pay Act (1963); Title II of the Genetic Information  
Nondiscrimination Act (2008); Title VII of the Civil Rights Act  
(1964); Title I and Title V of the Americans with Disabilities Act  
(1990)



## PERSONNEL

Policy Title EDUCATIONAL/EMPLOYMENT EQUITY Code 400.1

Inquiries regarding compliance with equal educational or employment opportunities and/or affirmative action shall be directed to Linn-Mar Equity Coordinators Executive Director of Human Resources Karla Christian or Deputy Superintendent Dirk Halupnik at 2999 North Tenth Street, Marion, Iowa, 52302, or 319-447-3036 / 319-447-3028, who have been designated by the school district to coordinate the school district's efforts to comply with the regulations implementing Title VI, Title VII, Title IX, the ADA, § 504, and *Iowa Code* § 280.3 (2007). Inquiries may also be directed, in writing, to the Iowa Civil Rights Commission, 400 E. 14<sup>th</sup> Street, Des Moines, IA, 50319, (800) 457-4416, the Director of the Region VII Office of the United States Equal Employment Opportunity Commission, 601 East 12<sup>th</sup> Street – Room 353, Kansas City, MO, 64106, (800) 368-1019, or the U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Bldg., 400 Maryland Avenue, SW, Washington, DC, 20202-1100, (800) 421-3481.

Page 2 of 2

Adopted 7/9/81 Reviewed 07/05; 12/11; 2/14; 9/8/14 Revised 8/07; 2/09; 2/10; 1/11; 4/15/13

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Nondiscrimination Act (2008); Title VII of the Civil Rights Act  
(1964); Title I and Title V of the Americans with Disabilities Act  
(1990)



LINN-MAR COMMUNITY SCHOOL DISTRICT  
EQUITY COMPLAINT FORM

Distribution of Form:

1. Equity Coordinator

Name of Complainant \_\_\_\_\_

Building \_\_\_\_\_

Date of Filing \_\_\_\_\_

Date Violation Occurred \_\_\_\_\_

Date Level I Meeting was held (optional) \_\_\_\_\_

Parties present at level I Meeting \_\_\_\_\_

\_\_\_\_\_

Nature of Complaint \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Remedy Requested \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Address/City

\_\_\_\_\_  
Phone

Disposition of Human Resources Director / Equity Coordinator \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature of Human Resources Director / Equity Coordinator

\_\_\_\_\_  
Date

Human Resources Director / Equity Coordinator's Disposition - Accepted or Rejected?

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\_\_\_\_\_  
Signature of Complainant

\_\_\_\_\_  
Date

Disposition by Superintendent

\_\_\_\_\_

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## PERSONNEL

Policy Title EQUAL EMPLOYMENT OPPORTUNITY

Code 401

The Linn-Mar Community School District will provide equal opportunity to employees and applicants for employment in accordance with applicable equal employment opportunity and affirmative action laws, directives and regulations of federal, state and local governing bodies. Opportunity to all employees and applicants for employment includes hiring, placement, promotion, transfer or demotion, recruitment, advertising or solicitation for employment, treatment during employment, rates of pay or other forms of compensation, and layoff or termination. It is a goal of the District to have a diverse workforce. Employees will support and comply with the district's established equal employment opportunity and diversity hiring practices. Employees will be given notice of this policy annually.

Individuals who file an application with the school district will be given consideration for employment if they meet or exceed the qualifications set by the Board, administration, and Iowa Department of Education for the position for which they apply. In employing individuals, the Linn-Mar Community School District will provide equal opportunity to employees and applicants for employment without regard to race, color, religion, creed, gender, national origin, age, disability, marital status, sexual orientation, gender identity, genetic information, as a covered veteran, or any other classification that is protected in accordance with applicable equal employment opportunity and affirmative action laws, directives and regulations of federal, state and local governing bodies.

Advertisements and notices for vacancies within the district will contain the following statement: "The Linn-Mar Community School District is an EEO employer dedicated to employing a diverse workforce of highly qualified employees." This statement will also appear on application forms.

Page 1 of 2

Adopted 11/7/05 Reviewed 1/11; 12/11; 4/13; 2/14; 9/8/14 Revised 8/07; 2/09; 2/15/10

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§621-634; 42 USC §§2000e et seq;  
42 USC §§12101 et seq; Iowa Code §§19B; 20; 35C; 73;  
216;279.8; 692.2; 692.2A; 692.2C(5); 235A.15; 235A.6e(9);  
281 IAC 12.4; 95; 28 IAC 14.1; Iowa Code 280.3; Vietnam Era  
Veterans Readjustment Assistance Act (1974), as amended, 38 U.S.C.  
4212; Age Discrimination in Employment Act (1967); Equal Pay Act  
(1963); Title II of the Genetic Information Nondiscrimination Act  
(2008); Title VII of the Civil Rights Act (1964); Title I and Title V of the  
Americans with Disabilities Act (1990)



## PERSONNEL

Policy Title EQUAL EMPLOYMENT OPPORTUNITY

Code 401

Inquiries by employees or applicants for employment regarding compliance with equal employment opportunity and polices, including but not limited to complaints of discrimination, will be directed to Linn-Mar Equity Coordinators Executive Director of Human Resources Karla Christian or Deputy Superintendent Dirk Halupnik at 2999 North Tenth Street, Marion, Iowa 52302, or 319-447-3036 / 319-447-3028, who have been designated by the school district to coordinate the school district's efforts to comply with the regulations implementing Title VI, Title VII, Title IX, the ADA, § 504, and *Iowa Code* § 280.3 (2007).

Inquiries by employees or applicants for employment regarding compliance with equal employment opportunity and federal employment laws and policies, including but not limited to complaints of discrimination, may also be directed in writing to the Iowa Civil Rights Commission, 400 E. 14<sup>th</sup> Street, Des Moines, IA, 50319, (800) 457-4416, the Director of the Region VII Office of the United States Equal Employment Opportunity Commission, 601 East 12<sup>th</sup> Street – Room 353, Kansas City, MO, 64106 (800) 368-1019, or the U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Bldg., 400 Maryland Avenue, SW, Washington, DC, 20202-1100, (800) 421-3481.

This inquiry or complaint to the federal office may be done instead of, or in addition to, an inquiry or complaint at the local level.

Further information and copies of the procedures for filing a complaint are available in the school district's central administrative office and the administrative office in each attendance center.

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Adopted 11/7/05 Reviewed 1/11; 12/11; 4/13; 2/14; 9/8/14 Revised 8/07; 2/09; 2/15/10

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§621-634; 42 USC §§2000e et seq;  
42 USC §§12101 et seq; Iowa Code §§19B; 20; 35C; 73;  
216;279.8; 692.2; 692.2A; 692.2C(5); 235A.15; 235A.6e(9);  
281 IAC 12.4; 95; 28 IAC 14.1; Iowa Code 280.3; Vietnam Era  
Veterans Readjustment Assistance Act (1974), as amended, 38 U.S.C.  
4212; Age Discrimination in Employment Act (1967); Equal Pay Act  
(1963); Title II of the Genetic Information Nondiscrimination Act  
(2008); Title VII of the Civil Rights Act (1964); Title I and Title V of  
the Americans with Disabilities Act (1990)



PERSONNEL QUALIFICATIONS,  
RECRUITMENT, SELECTION

Policy Title \_\_\_\_\_ Code 401.1

Persons interested in a position, other than administrative positions who will be employed in accordance with Board policies in Series 300, "Administration," shall have an opportunity to apply and qualify for positions in the school district without regard to race, color, religion, creed, gender, national origin, age, disability, marital status, sexual orientation, gender identity, genetic information, status as a covered veteran or any other classification that is protected in accordance with the applicable equal employment opportunity and affirmative action laws, directives and regulations of federal, state and local governing bodies. Job applicants for positions shall be considered on the basis of the following qualifications:

- Training, experience, and skill;
- Demonstrated competence; and
- Possession of, or ability to obtain, state license as required for the position.

Announcement of the position shall be in a manner which the superintendent believes will inform potential applicants about the position. Applications for employment may be obtained and completed online at the District's employment website or applicants may contact the office of Human Resources for assistance in completing an application. Administrators will follow district hiring practices to fill positions in their work area and will make recommendations to the superintendent or designee concerning a person's employment and possible assignment.

The superintendent will have the authority to employ

- classified personnel upon the recommendation of the Director of Human Resources, and
- a licensed person on a temporary basis based on the recommendation of the Director of Human Resources until action can be taken by the Board on the position.

The superintendent or designee will follow the requirements stated in the bargained agreement between employees in that certified collective bargaining unit and the Board regarding qualifications, recruitment and selections of such employees.

Adopted 6/15/70 Reviewed 2/09; 1/11; 2/14/ 9/8/14 Revised 5/01; 11/05; 2/10; 12/11; 4/15/13

Related Policy: (Code Number) 104, 401.3, 401.12, 402.1

Legal Reference: (Code of Iowa) 29 U.S.C. §§ 621-634; 42 U.S.C. §§ 2000e et seq; Iowa  
Code §§20; 35C; 216; 279.13; 281 IAC 12; 282 IAC 14





## PERSONNEL

Policy Title DEFINITION OF LICENSED PERSONNEL Code 401.2

The term “licensed personnel” means employees who must possess professional teaching licenses issued by the Iowa Department of Education in order to hold their positions. Professional personnel shall possess a license for the position they hold with the school district. The license shall meet the requirements set out by the Iowa Board of Educational Examiners. Each licensed professional must present a copy of his/her current license to the superintendent or designee prior to employment.

It is solely the responsibility of the teacher to file and maintain a valid teaching license with Human Resources. No licensed professional will be employed or permitted to serve without a current and valid license.

If an employee is found not to be properly licensed for an assigned position, that individual may not serve in the assigned position or be compensated until proper licensure is documented.

Adopted 4/25/85 Reviewed 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/97; 5/01; 11/05; 2/2/09

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Section 260.6; Iowa Code §§256.7(3); 272.6/272A; 279.8;  
294.1; 282 IAC 14; 281 IAXC 12.4; 41.25



## PERSONNEL

Policy Title LICENSED EMPLOYEE CONTINUING CONTRACTS Code 401.3

Contracts entered into with licensed employees, other than an administrator, will continue from year to year unless the contract states otherwise, is modified by mutual agreement between the Board and the employee, or the contract is terminated by the Board.

The first three years of a continuing contract issued to a newly employed, licensed employee shall be considered as serving a probationary period. The Board may waive this period or extend it for an additional year upon the recommendation of the licensed employee's supervisor. In the event of termination during this period, the Board shall afford the licensed employee appropriate due process. The action of the Board will be final.

New employees to the District who have successfully completed a probationary period in a previous school district will serve a one year probationary period. For purposes of this policy, an employee will have met the requirements for successfully completing a probationary period in another Iowa school district if, at the teachers' most recent performance evaluation, the teacher received at least a satisfactory or better evaluation and the individual has not engaged in conduct which would disqualify the teacher for a continuing contract.

Licensed employees whose contracts will be recommended for termination by the Board will receive notice prior to April 30. The superintendent shall make a recommendation to the Board for the termination of the licensed employee contract.

Licensed employees who wish to resign, to be released from a contract, or to retire must comply with board policy 401.7, Resignation.

Adopted 6/15/70 Reviewed 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/97; 5/01; 11/05; 2/2/09

Related Policy: (Code Number) 401.8

Legal Reference: (Code of Iowa) Iowa Code §§20; 27.12; 260; 279.12-.19B., 27; 294.1, §279.15



## PERSONNEL

Policy Title LICENSED PERSONNEL INITIAL ASSIGNMENT Code 401.4

The initial assignment of a licensed employee to a position in a school and/or department of the district shall be made by the superintendent, or designee, on the basis of the qualifications of the person for the position to be filled.

The superintendent or designee will follow the requirements stated in the bargained agreement between employees in that certified collective bargaining unit and the Board regarding assignment of such employees.

Adopted 6/15/70 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/97; 5/01; 11/7/05

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code §§20.9; 279.8



## PERSONNEL

Policy Title LICENSED PERSONNEL PROFESSIONAL DEVELOPMENT Code 401.5

To advance student achievement, the Board of Education encourages staff learning and professional development as part of a professional learning community. Therefore, the Board expects that licensed personnel participate in professional and staff development workshops and courses to maintain, develop, and extend their skills.

Staff development activities include workshops or courses in which the focus of the learning aligns with the Education Goals of the strategic plan, comprehensive school improvement goals, building school improvement goals, and instructional goals of the district. Staff development activities which occur during contract time are not eligible for advancement on the salary schedule.

Professional growth activities are those structured learning workshops or courses that advance the skills, knowledge, or practice of the professional in which participation of the professional is solely the professional's choice. Professional growth workshops or courses eligible for salary advancement must occur outside the contract day. Professional growth attained through coursework may lead to an advanced degree.

If the professional is compensated by the district for expenses, including tuition or registration, related to participation in a staff development or professional growth workshop or course, that workshop or course is not eligible for advancement on the salary schedule.

Requests for attendance or participation in a staff development or professional growth program during the contract day, other than those programs sponsored by the district, shall be made to the superintendent's designee in writing. Approval by the superintendent's designee must be obtained prior to attendance in the selected workshop or course.

The superintendent's designee shall have the discretion to allow or disallow the licensed professional to attend or participate in the requested event. When making this determination, the superintendent's designee will consider the value of the program for the employee and the school district, the effect of the employee's absence on the education program, school district operations and the school district's budget, as well as other factors deemed relevant in the judgment of the superintendent's designee.

Adopted 8/14/89 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/01; 11/7/05  
Related Policy: (Code Number) 401.14  
Legal Reference: (Code of Iowa) §279.8 (2005); 281 IAC 12.7



## PERSONNEL

Policy Title EVALUATION OF LICENSED PERSONNEL Code 401.6

Evaluation of licensed personnel on their skills, abilities, and competence shall be an ongoing process supervised by the building principals and conducted by approved evaluators. The licensed staff evaluation system used by the Linn-Mar Community School District is included in the district's performance evaluation system. The goal of the formal evaluation of licensed personnel, other than administrators, but including extracurricular personnel, shall be to

- improve the educational program,
- maintain licensed personnel who meet or exceed the Board's standards of performance,
- clarify each licensed employee's role,
- ascertain the areas in need of improvement,
- clarify the immediate priorities of the Board,
- develop a working relationship between the administrators and other school district personnel, and
- maintain ethical practice and conduct.

The superintendent or designee will follow the requirements stated in the master agreement between employees in a licensed collective bargaining unit and the Board regarding the evaluation of such employees.

This policy supports and does not preclude the ongoing informal evaluation of the licensed personnel's skills, abilities, and competence.

It shall be the responsibility of the superintendent to ensure licensed personnel who are not covered by the master agreement are evaluated annually.

Adopted 8/14/89 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13 Revised 5/01; 11/7/05; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) §§20.9, 279.14, 279.19, 279.27 (2005), 294.1  
281 IAC 12.3(3/4); Ch 83



## PERSONNEL

Policy Title LICENSED PERSONNEL RESIGNATION Code 401.7

A written resignation, signed by the employee, shall be submitted to the employee's immediate supervisor who will direct the resignation with recommendations to the superintendent. The superintendent will then make his/her recommendation to the Board of Directors as provided by the Iowa Code.

The Board recognizes that there are some circumstances which force an employee to request release from a contract before the expiration date of the contract. Therefore, personnel may be released from their contract if a suitable replacement can be found. Additionally, after June 30 through the first 45 calendar days of the school year, if the release of the employee is approved by the Board of Directors, the released employee shall be required to reimburse the District for the expenses associated with hiring his/her replacement equivalent to the cost of a Sunday ad package in a newspaper with state-wide distribution. Exceptions may be made in circumstances deemed an emergency or exceptional situation as determined by the Superintendent or designee.

In the event a licensed staff member terminates employment without proper release, the superintendent is directed to advise the Iowa Board of Educational Examiners for appropriate action.

Adopted 6/15/70 Reviewed 2/10; 1/11; 12/11; 4/13 Revised 5/01; 05/04; 11/05; 2/2/09; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) §279.13; 279.19A (2013); 91 A.2, .3, .5



## PERSONNEL

Policy Title LICENSED PERSONNEL EARLY SEPARATION Code 401.10

To recognize extended service to the Linn-Mar Community School District, the Board offers an early separation plan for licensed staff serving in an assignment of .5 or greater time equivalency. Five tenths to full-time employees (.5-1.0 FTE) are those who are currently performing their assigned duties within the school district and who satisfy the definition of a five-tenths to full-time employee (.5-1.0 FTE) as outlined in the respective contracts and terms and conditions of employment.

### 1. ELIGIBILITY

All non-administrative employees covered by this policy who have completed a total of 20 10 years of contracted service in positions requiring licensure with the Linn-Mar Community School District and who are at least 55 years of age shall be eligible for early separation as an employee of the district. Eligibility commences when 20 years of service are satisfied after the age of 55. Said employees will qualify for incentives upon submitting to the Board of Directors a written notification of intent for early separation no later than October 12; and upon receiving information regarding the incentives related to early separation, submit an Early Separation Request no later than January 12 of the last year of service. The effective date for an early separation corresponds to the ending date of the individual's contract year and the employee must work the entire contract year prior to early separation. However, should an employee's birth date occur after the start of a new contract year but before the beginning of classes, he/she may choose to retire on the date of his/her birthday. An early separation request with an effective date other than that will be considered on its individual merits by the Board of Directors.

### 2. COMPENSATION

Employees who elect to take early separation will be compensated as follows:

- A. All personal days earned but not used during the years of service to the district will be compensated for at the rate of substitute pay used during the last year of service.

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Adopted 6/13/88 Reviewed 2/09; 12/11; 4/13 Revised 05/04; 12/04; 11/05; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§ 621 et seq (1988); Senate File 2366, 77<sup>th</sup> Gen.

Assembly, 2<sup>nd</sup> Reg. Sess. (1998); Iowa Code §§ 97B; 216; 279.46; 509A.13 (2005); 581 IAC 21; 1978 Op. Att'y Gen 247; 1974 Op. Att'y Gen 11, 322.

## PERSONNEL

Policy Title LICENSED PERSONNEL EARLY SEPARATION Code 401.10

- B. Separation compensation will be calculated on said employee's base salary during the last contracted year of employment. If the employee has worked less than full-time during the five-year period immediately preceding separation, then the compensation shall be based upon the average of the last five years. This shall not include any compensation for insurance flex dollars, extra-curricular or extra duty, TSS dollars or performance contracts. This pay shall correspond to the following schedule relating to the end of that school year which is the employee's last year of active employment.

Eligibility commences when at least 20 years of service are satisfied after at least the age of 55.

Years of Eligibility	Percent of Base Salary
1-7	50%

### 3. INSURANCE

- A. Employees who elect to take early separation, pursuant to this policy, shall be eligible to continue participation in the district's group medical-hospitalization plan at the district's group rate. An employee's right to continue participation in such group insurance plan will be discontinued upon reaching the age of 65 or when insurance is obtained elsewhere.
- B. Employees who elect to take early separation, pursuant to this policy, shall be eligible to continue participation in the district's group term life insurance plan at the district's group rate. An employee's right to continue participation in such group insurance plan will be discontinued upon reaching the age of 65 or when insurance is obtained elsewhere.
- C. Employees shall pay the premiums for all such insurance. It is the responsibility of employees to pay to the school district the monthly premium amounts on such dates as determined by the school district. All insurance provided through the district shall be subject to the terms and conditions of the carriers.

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Adopted 6/13/88 Reviewed 2/09; 12/11; 4/13 Revised 05/04; 12/04; 11/05; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§ 621 et seq (1988); Senate File 2366, 77<sup>th</sup> Gen.

Assembly, 2<sup>nd</sup> Reg. Sess. (1998); Iowa Code §§ 97B; 216; 279.46; 509A.13 (2005); 581 IAC 21; 1978 Op. Att'y Gen 247; 1974 Op. Att'y Gen 11, 322.



## PERSONNEL

Policy Title LICENSED PERSONNEL EARLY SEPARATION Code 401.10

4. **COMPENSATION FOR DISTRICT WORK FOLLOWING EARLY SEPARATION**

Employees electing early separation may support the district as a substitute teacher or on a consultant basis. As consultants participating in this program, individuals will be offered employment which could include substitute teaching as allowed by the Board of Educational Examiners regulations, demonstration teaching, working on staff development and in-service programs, and curriculum development projects. Participants in this program will receive contracted amounts mutually designed not to interfere with benefits allowed by IPERS or social security.

5. **PAYMENT OPTIONS**

The Board shall determine the method of payment for the incentives as a 403(b) account and the time period during which to make full payment to the individual account within a one-(1) to five-(5) year span. The individual shall have the option to present his/her needs prior to the determination. The length of time for full payment shall be determined in writing and the appropriate installments calculated before the first payment is made. If the payment plan determined by the Board is unsatisfactory, the employee may retract his/her early separation request.

6. **RESTRICTIONS**

Separation pay shall not be granted to employees who are discharged for cause other than staff reduction.

Incentives pursuant to this policy can be received only once.

7. **BENEFICIARY**

In the event of the death of the employee prior to payment of the early separation incentive, the early separation incentive will be paid to the designated beneficiary in one lump sum payment. In the event no beneficiary is designated, the incentive will be paid to the employee's estate in one lump sum payment.

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Adopted 6/13/88 Reviewed 2/09; 12/11; 4/13 Revised 05/04; 12/04; 11/05; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§ 621 et seq (1988); Senate File 2366, 77<sup>th</sup> Gen.

Assembly, 2<sup>nd</sup> Reg. Sess. (1998); Iowa Code §§ 97B; 216; 279.46; 509A.13 (2005); 581 IAC 21; 1978 Op. Att'y Gen 247; 1974 Op. Att'y Gen 11, 322.

## PERSONNEL

Policy Title LICENSED PERSONNEL EARLY SEPARATION Code 401.10

### 8. AMENDMENT OR REPEAL

The Board has complete discretion to offer or not to offer an early separation plan for licensed employees. The Board may discontinue the school district's early separation plan at any time.

The adoption of this policy shall not vest any rights in any employee whether or not the employee is currently eligible for early separation. The Board shall have the complete discretion to amend or repeal this policy at any time. The district shall not be obligated to provide any of the incentives to any employee after the date of such amendment or repeal, except to those employees whose early separation pursuant to this policy has commenced prior to the amendment or repeal.

### 9. COMMUNICATION PROCESS

Following the Board's annual decision no later than May 15<sup>th</sup> regarding the offer of the incentives, employees who are eligible and who have notified the Board by October 12<sup>th</sup> of an intent to request early separation shall receive a letter from the administration notifying them of the conditions offered by the Board. Those employees shall respond no later than January 12<sup>th</sup> following the receipt of the letter with the conditions of the offer as to their acceptance of the conditions of the Board's early separation offer. The response shall be in the form of a letter indicating the eligible employee's intent to retire at the conclusion of their current contract.

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Adopted 6/13/88 Reviewed 2/09; 12/11; 4/13 Revised 05/04; 12/04; 11/05; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 USC §§ 621 *et seq* (1988); Senate File 2366, 77<sup>th</sup> Gen.

Assembly, 2<sup>nd</sup> Reg. Sess. (1998); Iowa Code §§ 97B; 216; 279.46;  
509A.13 (2005); 581 IAC 21; 1978 Op. Att'y Gen 247; 1974 Op.  
Att'y Gen 11, 322.



## PERSONNEL

Policy Title TUTORING Code 401.11

Every effort will be made by licensed employees to help students with learning problems and skill development as appropriate to the student's age and capacity.

Employees shall not solicit students or parents of students to purchase equipment, supplies, or services for the employee's personal advantage. Employees shall not use professional relationships with students for private advantage. Public property or funds shall not be converted to personal use.

Employees shall not render services for reimbursement directly from students enrolled in his/her classroom or supervision for tutoring, lessons, personal coaching or similar services.

Tutoring, lessons, personal coaching or any other type of professional instructional and/or skill support for a fee by non-employees may not take place within school facilities.

The superintendent will be responsible for administrative regulations pertaining to this policy.

Adopted 6/23/70 Reviewed 3/90; 2/09; 12/11; 4/13 Revised 5/01; 11/05; 2/10; 3/11; 9/8/14

Related Policy: Code Number

Legal Reference: (Code of Iowa) Iowa Code §§20.7; 279.8 (2013); 282-25.3(4)b; 282-25.3(6)f; 282-26.3(6)



## ADMINISTRATIVE REGULATIONS REGARDING TUTORING

### Permitted

1. Employees may offer services to enhance student skills only if they are compensated by the school district as employees of the District and the services are delivered outside of the employees contracted and/or assigned work day and stipended responsibilities. Student participation must be voluntary. Inclusion on a team, performance group, production, game, match, etc., cannot be contingent on participation in or utilization of the service.
2. Employees may offer services such as tutoring, lessons or personal training to enhance student skills to students not enrolled in his/her class, team or group, or attending Linn-Mar Schools.
3. Clinics, camps and workshops or activities for the purpose of skill development and enrichment experiences are permitted provided the following steps are completed:
  - a. The District fundraising form is completed and approved.
  - b. The District facility reservation form is completed and approved.
  - c. The District activity/event form, including a schedule, is completed and approved.Student participation must be voluntary. Inclusion on a team, performance group, production, game, match, etc., cannot be contingent on participation in the clinic, camp, workshop, etc.

### Prohibited

1. Linn-Mar employees may not provide tutoring, lessons, personal coaching and the like to a student currently enrolled in his/her class/listed, on his/her class roster or directly under his/her supervision.
2. Linn-Mar employees may not sell any product, equipment, or supply to students or parents for personal advantage.

### Responsibility

1. It is the employee's responsibility to comply with the policy and its regulations.
2. If found to be in non-compliance with the policy and/or the regulations, the employee will be notified of non-compliance and disciplinary consequences.
3. Failure to comply following notification will result in disciplinary action up to and including termination and a notification to the Board of Educational Examiners.

Adopted 3/28/11 Reviewed 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title SUBSTITUTE TEACHERS

Code 401.12

### QUALIFICATIONS:

Personnel serving on a substitute or temporary basis in the school district shall be licensed for the positions which they are to fill. Every effort shall be made to fill temporary positions with substitutes who have preparation equal to that of regular contract personnel and who have passed a background check. In the event such persons are not available, the employment of personnel who are properly licensed is authorized on a purely substitute or temporary basis.

If a substitute teacher is serving on a substitute or temporary basis in the school district for more than 60 days of teaching in one assignment, the responsible school administrator will contact the Executive Director of Human Resources to review the documented need and benefit to the instructional program.

### COMPENSATION:

The daily substitute rate shall be established by the Board of Directors. That daily rate shall apply for substitute teachers during the first ten days in the same assignment. On the 11th consecutive day of service in the same assignment, the rate shall become 1/191 of the B.A. base salary of the current schedule. On the 21st consecutive day of service in the same assignment, the rate of pay shall be \$29.00 \$30.00 per hour. Such per diem salary shall apply for only that period of employment in excess of 20 teaching days in the same assignment.

Substitute teachers receive no written contract or any benefits of a regular teacher (i.e., sick leave, etc.)

Adopted 6/15/70 Reviewed 11/05; 2/09; 12/11; 4/13 Revised 5/01; 2/10; 1/11; 9/9/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) IASB v. PERB, 400 NW 2d 571 (Ia 1987);  
Iowa Code §§20.1; .4(5); .9(2005); 281 IAC 12.4; 282 IAC  
14/119 (2); 272 (2013)



PERSONNEL

Policy Title STUDENT TEACHERS

Code 401.13

It is the policy of the Linn-Mar Schools to cooperate with the higher educational institutions in the practical preparation of future teachers. The Board will, through contracts, establish agreements with colleges and universities prior to placement of student teachers in the District's classrooms.

All compensations paid by the colleges or universities will be paid to the supervising teacher.

Adopted 6/15/70 Reviewed 5/01; 2/09; 2/10; 12/11; 4/13; 9/8/14 Revised 5/97; 11/7/05

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title PROFESSIONAL ADVANCEMENT  
ON SALARY SCHEDULE Code 401.14

Professional credit programs are those in-service staff development activities for which licensed staff members may receive credit that may be applied to advancement on the Linn-Mar salary schedule.

The evaluation of professional growth credit shall be based on a unit equivalent to one semester hour of college or university credit.

- a) At least fifteen (15) hours of attendance in an approved professional growth activity outside the Linn-Mar District, or
- b) At least fifteen (15) hours study and active participation in a professional course, in-service staff development course or seminar offered and sponsored by the Linn-Mar Community School.

Each employee will be responsible for reporting professional growth activities on the District application forms. The deadline for submission is:

- Intent for Horizontal Level Change and Approval of Course Selection (prior to enrolling in the course) – March 1.

Professional, licensed staff may advance on the salary schedule through successful participation in approved graduate course work that advances the professional's growth in the educational field. The same forms and deadlines apply to college and university course work as to professional credit courses.

Adopted 8/10/70 Reviewed 2/10; 1/11; 12/11; 4/13 Revised 5/97; 11/05; 2/2/09; 9/8/14  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) Iowa Code 20.1, .4, .7, .9; 279.8 (2013)



## PERSONNEL

Policy Title CHILD ABUSE REPORTING BY LICENSED PERSONNEL Code 401.15

All licensed staff members are required to orally report any suspected cases of child abuse to the Department of Human Services within 24 hour of observation followed up by a written report within 48 hours of the oral report. All observers shall report directly to the county office of the Department of Human Services.

The administration shall develop reporting procedures that comply with legal requirements, and shall instruct members of the professional staff in their obligations with regard to reporting child abuse.

Adopted 7/12/79 Reviewed 11/05; 2/09; 2/10; 1/11; 12/11; 4/13 Revised 5/21/01; 9/8/14  
Related Policy: (Code Number) 411.3-R/505.52-R  
Legal Reference: (Code of Iowa) 232A 232.67-.77, 232.70, 232.73, 232.75; Chapter 235A; 280.17 (2013); 441.I.A.C. 9.2; 155; 175; 1982 Op. Att'y Gen. 390, 417; 1980 Op. Att'y Gen. 275





## ADMINISTRATIVE REGULATION REGARDING CHILD ABUSE REPORTING BY LICENSED PERSONNEL

The Code of Iowa requires licensed school employees to report to the Department of Human Services all instances of suspected child abuse involving students.

The law further specifies that any licensed school employee who knowingly or willfully fails to report a suspected case of child abuse is guilty of a simple misdemeanor, and may also leave the employee open to civil liability for the damages caused by his/her failure to report.

The Iowa Code provides immunity from any liability—civil or criminal—to anyone participating in good faith in the making of a report or in judicial proceedings that may result from the report.

### Child Abuse Defined

“Child abuse” or “abuse” means “harm occurring through”:

1. Any non-accidental physical injury or injury that is at variance with the history given of it, suffered by a child (that is, any person under 18 years of age) as a result of the acts or omissions of a person responsible for the care of the child.\*
2. The commission of any sexual abuse with or to a child as defined by Chapter 709, Iowa Code, as a result of the acts or omissions of the person responsible for the child.\*
3. The failure on the part of a person responsible for the care of a child to provide for the adequate food, shelter, clothing, or other care necessary for the child's health and welfare when financially able to do so or when offered financial or other reasonable means to do so.

(A parent or guardian legitimately practicing religious beliefs who does not provide specified medical treatment for a child for that reason alone shall not be considered abusing the child; however, a court may still order that medical services be given to the child if the child's health requires it.)

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\*Teachers in public schools are not "persons responsible for the care of the child" under these clauses. However, a teacher who abuses a child is subject to civil, criminal, and professional sanctions.

## Reporting Procedures

The Code establishes reporting and investigation procedures for alleged cases of child abuse. Licensed school employees, including teachers and school nurses, are required to orally report within 24 hours to the Department of Human Services when the person “reasonably believes a child has suffered from abuse.” The requirement to report is mandatory. Within 48 hours of the oral report, a written report must be forwarded to the Department of Human Services.

Each report should contain as much of the following information as can be obtained within the time limit.

- name, age, address of the suspected abused child;
- name, address of parents, guardians, or persons legally responsible for his/her care;
- description of injuries, including evidence of previous injuries;
- name, age, and condition of other children in the home;
- the child's whereabouts if different from parents, guardians, or persons legally responsible for the child;
- any other information considered helpful;
- name, address of person making the report.

The law specified that a report will be considered valid even if it does not contain all of the above information.

It is not the responsibility of school employees to prove that a child has been abused or neglected, and that school employees should not take it upon themselves to investigate the case or contact the family of the child to ask questions or make any kind of judgment. The Department of Human Services has the responsibility to follow up on the report.



## PERSONNEL

Policy Title LICENSED EMPLOYEE SUSPENSION

Code 401.16

Licensed employees will perform their assigned job, respect and follow Board policy and obey the law. The superintendent is authorized to suspend a licensed employee pending Board action on a discharge, for investigation of charges against the employee, and for disciplinary purposes. It is within the discretion of the superintendent to suspend a licensed employee with or without pay.

In the event of a suspension, appropriate due process will be followed.

Adopted 3/13/06 Reviewed 2/09; 2/10; 12/11; 4/13 Revised 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Northeast Community Education Agency v. Northeast Community School District, 402 N.W. 2d 765 (Iowa 1987); McFarland v. Board of Education of Norwalk Community School District, 277 N.W. 2d 901 (Iowa 1979); §§20.7, .24; 279.13, .15-.19, .27 (2013)



## PERSONNEL

Policy Title DEFINITION OF CLASSIFIED PERSONNEL Code 402.1

Classified employees are employees who are not administrators or employees in positions which require an Iowa Department of Education teaching license and who are employed to fulfill the duties listed on their job description on a monthly or hourly basis.

The term “classified personnel” shall include, but not be limited to, the following employees whether full-time or part-time:

- Custodial and Maintenance employees
- Secretarial and Clerical employees
- Food Service employees
- Bus Drivers
- Paraprofessionals
- Educational Assistants

Written job specifications and job descriptions shall be established by the school administration for all positions that require classified personnel.

There shall be two classifications of full-time employees. To qualify for full-time employment, an employee must work a minimum of 35 hours per week.

1. Full-time, 12-month employees
2. Full-time, 9-, 10-, or 11-month employees

Adopted 6/15/70 Reviewed 2/09; 2/10; 12/11; 4/13 Revised 5/97; 5/01; 1/16/06; 9/8/14  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) Iowa Code §§ 20; 279.8 (2013)



## PERSONNEL

Policy Title ASSIGNMENT AND TRANSFER OF CLASSIFIED PERSONNEL Code 402.2

Assignment of classified personnel shall be based upon the qualifications of the employee and the philosophy and needs of the school district.

Changes in assignment may be made at the initiative of the superintendent or other supervisory staff members, or may be considered at the request of the employee. All changes in employment shall be made with full knowledge of the employee.

Procedures governing employee transfers must be in accordance with the requirements of existing collective bargaining agreements.

Adopted 6/13/85 Reviewed 1/06; 2/09; 2/10; 12/11; 4/13 Revised 5/97; 1/24/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_ Section 20.9; 35C; 216; 294.1 (2013); 601A.14; 279.8 (2013); 29 U.S.C. 621 – 634 (2012); 42 U.S.C. 2000e et seq. (2012); 42 U.S.C. 12101 et seq. (2012)



## PERSONNEL

Policy Title EVALUATION OF CLASSIFIED PERSONNEL Code 402.3

The Superintendent of Schools, or designee, shall be responsible for the continuous evaluation of the classified employees of the district. Evaluations will link specific goals to those of the District, building or department.

Evaluations measure, monitor, and manage job performance as well as:

- Assist with employment related decisions
- Provide an opportunity for dialogue to encourage two-way discussion and collaboration
- Serve as a development and career planning tool

Supervisors of classified personnel shall submit such evaluations to the superintendent or designee in such manner and at such times as may be determined by the Board and the superintendent.

This policy supports and does not preclude ongoing informal evaluation of the classified employee's skills, abilities and competence.

Adopted 6/15/70 Reviewed 2/09; 12/11; 4/13 Revised 5/97; 5/01; 1/06; 2/15/10; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code §§ 20.9; 279.14 (2014); 281 I.A.C. 12.3(3); 279.23A; Aplington Community School District v. PERB, 392 N.W.2d 495 (Iowa 1986); Saydel Education Association v. PERB, 333 N.W.2d 486 (Iowa 1983)



## PERSONNEL

Policy Title CLASSIFIED PERSONNEL EMPLOYMENT/RESIGNATION Code 402.4

Classified personnel and exempt employees without a Chapter 279 (licensed employees) contract are employed on an at-will basis. Classified employees may resign their employment at any time for any reason, and the Board retains that same right.

A written resignation, signed by the employee, shall be submitted to the employee's immediate supervisor who will direct the resignation with recommendations to the superintendent, or designee. The superintendent will then inform the Board of Directors.

Procedures governing employee resignations must be in accordance with the requirements of existing collective bargaining agreements.

Adopted 6/15/70 Reviewed 1/06; 2/10; 12/11; 4/13 Revised 5/97; 1/06; 2/2/09; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code 91 A.2, .3, .5; 279.19A; 285.5(9) (2013)



## PERSONNEL

Policy Title DISMISSAL/SUSPENSION OF CLASSIFIED PERSONNEL Code 402.5

The superintendent, or designee, has the authority to suspend or dismiss the services of any classified employee.

Adopted 6/15/70 Reviewed 2/09; 2/10; 12/11; 4/13; 9/8/14 Revised 5/97; 5/21/01

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_





## PERSONNEL

Policy Title REDUCTION IN FORCE OF CLASSIFIED PERSONNEL Code 402.6

The number of classified staff may be reduced due to budgetary considerations or other good reason as determined by the Board or their designee. The Board's decision shall be final. Reduction shall be accomplished through normal staff attrition, unless the best interests of the school district dictate otherwise. When reductions beyond normal staff attrition are made, classified personnel will receive ten (10) days written notice of termination.

Any reduction in force procedure contained in a valid collective bargaining agreement will be honored by the Board; however, such a procedure in no way diminishes the Board's executive power, duty, and right to hire, promote, demote, transfer, assign, and retain public employees.

Adopted 6/13/85 Reviewed 2/09; 2/10; 12/11; 4/13 Revised 5/97; 5/21/01; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_ Sections 20.7, 9, 24 (2013)



## PERSONNEL

Policy Title PERSONNEL MILITARY SERVICE Code 402.7

The Board will abide by all the provisions of the Uniformed Services Employment and Re-Employment Right Act (USERRA) and the Iowa Military Code and will grant military leave to all eligible full-time and part-time employees.

Military leave may be granted to full-time and part-time employees. A leave of absence will be granted to non-temporary employees who are members of the uniformed services, when ordered by proper authority to serve in the uniformed services. Following such leave, employees have the right to be reinstated to their same or comparable position the following conditions:

1. Employee ensures the District Human Resources office receives advance written or verbal notice of your service, unless giving such notice is impossible, unreasonable or precluded by military necessity;
2. Employee has five years or less of cumulative service in the uniformed services while with the District;
3. Employee returns to work or applies for reemployment in a timely manner after conclusion of service;
4. Employee has not been separated from service with a disqualifying discharge or under other than honorable conditions.

The first thirty calendar days of military leave will be without loss of status or efficiency rating and without loss of pay. Where the military leave is for a period of less than 30 days, a paid leave of absence will be granted only for those days the employee would normally perform services for the District. An employee's salary will not continue beyond the thirtieth calendar day during a military leave unless required by law. However, employees may request to use any vacation or personal leave time accrued during military leave.

Health insurance benefit coverage will continue for 31 days as long as employees pay their normal portion of the cost of benefits. For leave lasting longer than 31 days, employees will be eligible to continue health benefits under COBRA and will be required to pay 102 percent of the total cost of their health benefits if they wish to continue benefits for up to 24 months while in the military. If employees do not elect to continue coverage during their military service, they have the right to be reinstated in the District's health plan when they are reemployed, generally without any waiting periods or exclusions except for service-connected illnesses or injuries.

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Adopted 6/15/70 Reviewed 3/11; 12/11; 4/13; 9/8/14 Revised 5/01; 1/06; 2/10; 1/28/13  
Related Policy: (Code Number) Bewley v. Villisca CSD, 299 NW 2d 904 (IA 1980); IA Code §§  
20; 29A.28 (2005)

Legal Reference: (Code of Iowa) Chapter 29.A28

## PERSONNEL

Policy Title PERSONNEL MILITARY SERVICE Code 402.7

Group term life/AD&D insurance provided by the District (if applicable) and group long term disability insurance provided by the District (if applicable) will terminate the day the employee becomes active military. Voluntary supplemental life insurance will terminate the day the employee becomes active military. Converting to an individual policy may continue voluntary dependent life insurance coverage up to two months. To exercise this conversion option, dependents must submit a written application and the first premium payment within 31 days immediately following the termination of coverage.

If an employee was a participant in a 403(b) plan at the time he/she left for military duty, the employee will be permitted to make additional contributions to the plan. Employees may initiate these additional payments as of their reemployment date and continue them for the period of time permitted by law.

Employees do not accrue vacation, personal leave or sick leave while on military leave of absence status.

Upon return from military leave, employees will be reinstated to the same or comparable job with the same seniority, pay, status, and benefit rights that they would have had if they had worked continuously. Employees must apply for reemployment within 90 days of discharge from the military. Employees who fail to report for work within the prescribed time after completion of military service will be considered to have voluntarily terminated their employment.

In addition to the employee's failure to apply for reemployment in a timely manner, an employee is not entitled to reinstatement as described above if any of the following conditions exist:

1. The employee's employment prior to the military service was merely for a brief, temporary or non-recurrent period and there was no reasonable expectation that the employment would have continued indefinitely or for a significant period.
2. The employee did not receive an honorable discharge from military service.

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Adopted 6/15/70 Reviewed 3/11; 12/11; 4/13; 9/8/14 Revised 5/01; 1/06; 2/10; 1/28/13

Related Policy: (Code Number) Bewley v. Villisca CSD, 299 NW 2d 904 (IA 1980); IA Code §§ 20; 29A.28 (2005)

Legal Reference: (Code of Iowa) Chapter 29.A28



## PERSONNEL

Policy Title CLASSIFIED PERSONNEL ABSENCE WITHOUT PAY Code 402.8

When all available and applicable paid leave of absence has been depleted, absence without pay may be authorized by the superintendent, or designee, for purposes considered urgent and necessary. For such absences, district attendance procedures will be utilized.

To apply for such leave, the employee shall make written application to the superintendent or designee for such authorization at least ten (10) days in advance of the occurrence or, if advance application is not possible, not later than ten (10) days after the occurrence.

An unpaid involuntary absence may be excused by the superintendent, or designee. The employee shall make immediate application to the superintendent, or designee, to request such absence.

Other absences than those herein provided for, or failure to follow District policy and/or attendance procedures, may be deemed to be neglect of duty and may be sufficient grounds for dismissal.

Adopted 6/15/70 Reviewed 2/09; 1/11; 12/11; 3/13; 9/8/14 Revised 5/01; 1/06; 2/10; 4/15/13

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code §§ 20.9; 279.8



## PERSONNEL

Policy Title RELATIONS TO STUDENTS AND PUBLIC Code 402.9

In general, classified personnel should assume no authority with students except in the following situations.

- 1) A bus driver is in full charge of the bus, and students shall obey the driver promptly. The driver is required to report each case of misconduct to the Director of Transportation.
- 2) Certain associates and secretaries are designated to deal with students in attendance and related matters.
- 3) In the absence of an administrator, and when teachers are not present, the custodian has responsibility for the security and care of physical facilities.
- 4) When no licensed staff member is immediately present, classified personnel are expected to act in the best interests of the district and its patrons with regard to student/public behavior or building/property.
- 5) Direct supervision of students may be assigned by the building administration.

Adopted 6/15/70 Reviewed 2/09; 2/10; 12/11; 4/13; 9/8/14 Revised 5/97; 5/01; 1/16/06  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title CLASSIFIED EMPLOYEE WORKWEEK, WAGE AND  
OVERTIME COMPENSATION/COMPENSATORY TIME Code 402.10

The district workweek begins on Saturday and ends on Friday. Regular work hours during the school year are determined by the needs of the school district and shall be designated by the responsible administrator. Administrators will document regular employee work hours. Arrangements that deviate from regular work hours for more than two (2) weeks will be documented prior to the arrangement commencing. The standard workday for classified hourly employees is up to eight (8) hours of which all employees are expected to work in full. The standard workweek for classified hourly employees is up to 40 hours, as determined by administration.

Time worked includes all time that an employee is required to be physically at work. Time worked is used to determine overtime pay and/or compensatory time required for employees. Employees shall not be permitted to perform work away from the premises, job site, or at home, unless approved in advance by the superintendent or designee.

The district does not count approved paid leave or uninterrupted lunch periods as time worked unless expressly permitted in a collective bargaining agreement.

Each non-exempt employee compensated on an hour-by-hour basis, whether full or part-time, permanent or temporary, will be paid no less than the prevailing minimum wage. Whenever a non-exempt hourly employee must work more than 40 hours in a given work week, the employee is compensated at one and one-half times their regular hourly wage rate in excess of 40 hours. This compensation is in the form of overtime pay or compensatory time. Overtime will not be permitted without prior documented authorization of the direct supervisor. Compensatory time will not be allowed unless documented and permitted in a collective bargaining agreement.

Each non-exempt employee paid on an hour-by-hour basis must submit a daily record showing the actual number of hours worked. Failure of the employee to maintain, or falsification of, a daily time record will be grounds for disciplinary action, up to and including termination.

Adopted 3/13/06 Reviewed 2/09; 1/11; 12/11; 4/13; 9/8/14 Revised 2/15/10

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Garcia v San Antonio Metropolitan Transit Authority, 469U.S.  
528; 29 U.S.C. §§ 206 et seq.; 29C.F.R. Pt. 500-899; Fair  
Labor Standards Act (1938)



Code: 402.10-E

## Overtime / Unscheduled Hours Approval Form

This form is to be used to document all overtime or time worked over scheduled hours. Overages may only be approved for reasons relating to building safety and security or for District required meetings. The supervisor must approve overtime PRIOR to the beginning of overtime work, except in cases of extenuating circumstances. The supervisor will keep a copy of the completed form in his/her file and forward the original to the Human Resources Department.

Name of Employee: \_\_\_\_\_ Department: \_\_\_\_\_

Date(s) of Overtime Work \_\_\_\_\_ No. of Hours \_\_\_\_\_

Reason for overtime/unscheduled hours:

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Overtime/Time Over Schedule is: \_\_\_\_\_ Approved \_\_\_\_\_ Not Approved

Supervisor approval: \_\_\_\_\_ Date: \_\_\_\_\_

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

Adopted: 3/13/06 Reviewed 12/11; 4/13; 9/8/14 Revised: 2/10; 1/24/11



## PERSONNEL

Policy Title EDUCATION ASSISTANT Code 402.11

The board may employ education assistants or other instructional support personnel to assist licensed personnel in non-teaching duties, including, but not limited to:

- managing and maintaining records, materials and equipment;
- attending to the physical needs of children; and
- performing other limited services to support teaching duties when such duties are determined and directed by the teacher.

Education assistants, certified or non-certified, who hold a teaching certificate are compensated at the rate of pay established for the position as an education assistant. It is the responsibility of the principal or designee to supervise education assistants.

Adopted 3/13/06 Reviewed 2/09; 2/10; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) §§279.8; 280.3, .14 (2005); 281 I.A.C. 12.4(9); .5(9)





## PERSONNEL

Policy Title LICENSED EQUIPMENT OPERATORS Code 402.12

In order to provide a safe working environment, equipment operators should be properly trained and licensed. All equipment operators must be 18 years of age and have a valid driver's license. Operators are subject to any required regular testing or licensing requirement by the State or per District procedures. These procedures may include physical, instructional or visual testing as well as a drug screen.

Any unsafe actions by a licensed operator will lead to corrective action up to and including termination. Any employees choosing to operate motorized equipment without proper training, license and the consent of their supervisors will be subject to corrective action up to and including termination.

Adopted 2/2/09 Reviewed 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title PHYSICAL EXAMINATION / FITNESS FOR DUTY Code 403.1

All full-time and regular part-time employees are to present evidence of good physical health after the initial job offer and prior to the start of employment or within 30 work days, whichever is earlier. The Verification of Physical Fitness forms shall be provided by the school district. Completed examination forms are to be kept on file in the superintendent's or designee's office.

Bus drivers shall be required to take an initial physical examination, one annually thereafter and shall meet all other medical and fitness requirements specified by State and Federal transportation regulations.

Employees shall successfully complete a physical examination by a physician or clinic designated by the District at the Board's designated provider. The District will pay the entire cost of the examination.

All persons shall be required to undergo a check for tuberculosis when employed and file the results with the superintendent or designee.

Fitness-for duty examinations may be required following an absence from work due to illness or injury, if there is a reasonable belief that the employee is unable to perform the essential functions of the job, or if there is a reasonable belief that the employee poses a direct threat to the employee or others because of a health condition.

Adopted 6/23/70 Reviewed 1/11; 12/11; 9/8/14 Revised 5/01; 1/06; 2/09; 2/10; 4/15/13

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 29 C.F.R. Pt. 1910.1030; Iowa Code §§ 20.9; 279.8; 321.376;  
281 I.A.C. 12.4 (14); 43.15-.20



## PERSONNEL

Policy Title EMPLOYEE RECOGNITION Code 403.2

Employees of the Linn-Mar Community School District may receive recognition incentives and service awards based on exemplary job performance and years of service to the district.

These incentives and service awards are for employment performance, active participation in safety and wellness initiatives, and years of service, and therefore, are presented with proper circumstances, proper motive, and for public purpose.

Service awards may be presented at various intervals, as specified by the district.

Adopted 6/11/90 Reviewed 1/11; 12/11; 9/8/14 Revised 1/06; 2/09; 2/10; 4/15/13  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) Iowa Const. Art. III § 31; Iowa Code § 279.8



## PERSONNEL

Policy Title VIOLENCE IN THE WORKPLACE Code 403.3

The Linn-Mar Community School District is committed to providing a safe, professional work environment that is free of violence, either by employee against employee, employee against student, by third parties against employees, or by employees against third parties. Workplace violence includes, but is not limited to, the following when such conduct is committed on Linn-Mar property, at a school district activity or event, or in connection with a school district activity or event:

- the offensive and/or unlawful touching by one person against another;
- threats of harm (bodily or otherwise) to another;
- the use of abusive language, threatening, or intimidating comments;
- the possession of unauthorized firearms or weapons while on school district property;
- conduct detrimental to school district personnel, which may cause undue disruption of work or endanger the safety of persons or property;
- stalking;
- causing or encouraging another to commit conduct as listed above.

Such conduct by employees, depending on the level of severity, may result in removal from the premises as quickly as safety permits and shall remain off District premises pending the outcome of an investigation. In addition, the employee will be subject to disciplinary action, up to and including termination of employment and legal action. Such conduct by third parties will be subject to legal action.

Allegations of workplace violence shall be investigated and, if substantiated, disciplinary action shall be taken. Legal actions will also be taken, if appropriate.

Compliant Procedures: Employees or third parties who believe they have been subjected to violence in the workplace or believe they have witnessed such behavior as defined in this policy should immediately terminate all contact and communication with the offending party and file a written complaint with the Superintendent or Executive Director of Human Resources who will determine if an investigation is warranted. The investigator may request that the individual complete a signed, written complaint form and submit other evidence of the violent act including but not limited to, letters, electronic documents or pictures. If substantiated, the District will conduct a timely investigation in as confidential a manner as possible. Interviews, allegations, statements and identities will be kept confidential to the extent possible and allowed by law. However, the District will not allow the goal of confidentiality to be a deterrent to an effective investigation and all

## PERSONNEL

Policy Title VIOLENCE IN THE WORKPLACE Code 403.3

employees who are involved in an investigation are expected to provide honest and complete cooperation. Appropriate disciplinary action, up to and including termination, will be taken promptly against any employee engaging in acts of violence and /or employees who are found to be dishonest or uncooperative during an investigation. The corrective action issued will be proportional to the severity of the conduct.

The District prohibits retaliation of any kind against employees who, in good faith, report bona fide acts of violence, assist with or conduct an investigation regarding such complaints or appear as a witness. Initiating a complaint under this policy shall not cause any negative impact on complainants or participants in the investigation nor shall it affect their employment, compensation, or work assignments. If an employee feels he/she has been subjected to any form of retaliation, the employee should report that conduct to the Executive Director of Human Resources within three calendar days of the offense.

Retaliation or attempted retaliation is a violation of this policy and anyone who does so will be subject to severe discipline up to and including termination.



## PERSONNEL

Policy Title SUBSTANCE-FREE WORKPLACE Code 403.4

The Board expects the school district and its employees to remain substance free. No employee will unlawfully manufacture, distribute, dispense, possess, use, or be under the influence of, in the workplace, any narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana, or any other controlled substance or alcoholic beverage as defined by federal or state law. "Workplace" includes school district facilities, school district premises or school district vehicle, also includes nonschool property if the employee is at any school-sponsored, school-approved, or school-related activity, event or function, such as field trips or athletic events where students are under the control of the school district or where the employee is engaged in school business.

If an employee is arrested or cited for a criminal substance offense, that employee shall notify their supervisor before reporting to regular duties or within 48 hours of arrest or citation. If an employee is convicted of a violation of any criminal substance offense committed in the workplace, the employee will notify the employee's supervisor within five days of the conviction.

Employees shall abide by the terms of this policy respecting a substance-free workplace. An employee who violates the terms of this policy may be required to successfully participate in an alcohol or drug abuse assistance or rehabilitation program approved by the Board.

If administration, directors, managers or supervisors have reasonable cause to believe an employee has violated this policy, they will immediately contact the Superintendent or Executive Director of Human Resources, who will determine if an investigation is warranted. The investigator may request that the individual complete a signed, written complaint form and submit other evidence of the violation including but not limited to, letters, electronic documents or pictures. If substantiated, the District will conduct a timely investigation in as confidential a manner as possible. Interviews, allegations, statements and identities will be kept confidential to the extent possible and allowed by law. However, the District will not allow the goal of confidentiality to be a deterrent to an effective investigation and all employees who are involved in an investigation are expected to provide honest and complete cooperation. If, at the conclusion of the investigation, it is found that an employee has violated this policy, the superintendent or designee will make the determination whether to require the employee to undergo substance abuse treatment and/or to discipline the employee. If the employee fails to successfully participate in such a program, the employee's contract shall not be renewed or employment may be suspended or terminated, at the discretion of the Board. Sanctions against employees, including non-renewal, suspension, and termination shall be in accordance with prescribed school district administration regulations and procedures.

Page 1 of 2

Adopted 3/4/91 Reviewed 2/10; 12/11; 4/13; 9/8/14 Revised 3/06; 2/2/09

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 41 U.S.C. §§ 701-707 (1994); 42 U.S.C. §§ 12101 et seq. (1994); 34 C.F.R. Pt. 85 (2002); §§ 123.46; 124; 279.8 (2005)

## PERSONNEL

Policy Title SUBSTANCE-FREE WORKPLACE Code 403.4

In addition, appropriate disciplinary action, up to and including termination, will be taken promptly against any employee who is found to be dishonest or uncooperative during an investigation. The corrective action issued will be proportional to the severity of the conduct.

The superintendent is responsible for publication and dissemination of this policy to each employee. In addition, the superintendent or designee will oversee the establishment of a substance-free awareness program to educate employees about the dangers of substance abuse and notify them of available substance abuse treatment programs. It is the responsibility of the superintendent to develop administrative regulations to implement this policy.

Page 2 of 2

Adopted 3/4/91 Reviewed 2/10; 12/11; 4/13; 9/8/14 Revised 3/06; 2/2/09

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 41 U.S.C. §§ 701-707 (1994); 42 U.S.C.  
§§ 12101 *et seq.* (1994); 34 C.F.R. Pt. 85 (2002); §§ 123.46;  
124; 279.8 (2005)



## NOTICE TO EMPLOYEES REGARDING SUBSTANCE-FREE WORKPLACE

YOU ARE HEREBY NOTIFIED that it is a violation of the Substance-Free Workplace policy of the Linn-Mar Community School District for any employee to distribute, dispense, possess, use, or be under the influence of any alcoholic beverage, malt beverage or fortified wine, or other intoxicating liquor, or to unlawfully manufacture, distribute, dispense, possess, or use, or be under the influence of any narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana, anabolic steroid, or any other controlled substance, as defined in schedules I through V of section 202 of the Controlled Substances Act (21 U.S.C. § 812) and as further defined by regulation at 21 Code of Federal Regulations 1300.11 through 1300.15 and Iowa Code Chapter 204, before, during, or after school hours at school or in any other workplace location as defined below.

“Workplace” is defined as the site for the performance of work done in the capacity as an employee. This includes school district facilities, other school premises or school district vehicles. Workplace also includes non-school property if the employee is at any school-sponsored, school-approved, or school-related activity, event or function, such as field trips or athletic events where students are under the control of the school district or where the employee is engaged in school business.

Employees who violate the terms of the Substance-Free Workplace policy may be required to successfully participate in a substance abuse treatment program approved by the Board. The superintendent retains the discretion to discipline an employee for violation of the Substance-Free Workplace policy. If the employee fails to successfully participate in such a program the employee is subject to discipline up to and including termination.

YOU ARE NOTIFIED that if you are arrested or cited for a criminal substance offense, you shall notify your supervisor before reporting to regular duties or within 48 hours of arrest or citation.

YOU ARE FURTHER NOTIFIED that you are required to notify your supervisor of your conviction of any criminal drug statute for a violation occurring in the workplace, no later than five (5) days after such conviction.

I, \_\_\_\_\_, have read and understand the Substance-Free Workplace policy. I understand that if I violate the Substance-Free Workplace policy, I may be subject to discipline up to and including termination [*or I may be required to participate in a substance abuse treatment program*]. If I fail to successfully participate in a substance abuse treatment program, I understand that I may be subject to discipline up to and including termination. I understand that if I am required to participate in a substance abuse treatment program and I refuse to participate, I may be subject to discipline up to and including termination. I also understand that if I am convicted of a criminal drug offense committed in the workplace, I must report that conviction to my supervisor within five days of the conviction.

I have received and read the above notice.

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*Employee's Signature*

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*Date*

This notice should be returned within ten (10) working days of the employee's **initial** date of employment.

*Reviewed 9/2014*





## PERSONNEL

Policy Title TOBACCO-FREE, NICOTINE-FREE ENVIRONMENT Code 403.5

School district premises, including school vehicles, shall be off limits for smoking and the use of other tobacco products including the use of nicotine products that are not FDA (Federal Drug Administration) approved for tobacco cessation, as well as "vaping" with E-cigarettes (or any electronic smoking device such as, but not limited to, cigarette, cigar, cigarillo or pipe). This requirement extends to all employees, students, patrons, and visitors. This policy applies at all times, including school-sponsored and non school-sponsored events. Persons failing to abide by this request shall be required to dispose of all tobacco products, nicotine products, and materials or leave the school district premises immediately. Any employee or student failing to abide with this policy will be subject to disciplinary action.

Adopted 4/18/88 Reviewed 1/06; 2/09; 2/10; 1/11; 12/11 Revised 4/15/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) 142B; 279.9; 197 (1993)



ADMINISTRATIVE REGULATIONS  
FOR ACCOMPLISHING A TOBACCO-FREE AND NICOTINE-FREE ENVIRONMENT

The success of this policy will depend upon the thoughtfulness, consideration, and cooperation of smokers and non-smokers. All individuals on school premises share in the responsibility for adhering to and assisting in compliance of this policy.

Visitors

Community members who rent school facilities will be asked to sign a statement indicating their assumption of the responsibility of adhering to the Tobacco-Free, Nicotine-Free Environment Policy. It will be their responsibility to supervise their own activities to accomplish a tobacco-free, nicotine-free environment. Visitors attending school functions will be asked by the staff members in authority to not use nicotine products and/or tobacco on school grounds and school vehicles. Persons willfully refusing to comply will be considered trespassers and reported to police.

Students

Students will be treated in accordance with Policy 502.4.

Employees

Employees who willfully violate the policy will be considered as demonstrating insubordination. Their conduct will be treated through due process procedures.



PERSONNEL

Policy Title EXIT COMMENT

Code 403.6

Every (full-time or regular part-time) Linn-Mar employee will be asked to complete an exit interview and/or complete an Exit Comment form when leaving the employment of the Linn-Mar Community School District. The Executive Director of Human Resources, or designee, shall have the responsibility of distributing, collecting, and tabulating data from Exit Comment forms and shall process the information as appropriate.

Adopted 6/9/77 Reviewed 2/09; 2/10; 12/1; 9/8/14 Revised 5/01; 1/06; 1/11; 4/15/13

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title FAMILY AND MEDICAL LEAVE Code 403.7

The Family and Medical Leave Act of 1993 (FMLA) provides that unpaid family and medical leave will be granted up to 12 weeks per year to employees who meet certain conditions.

An eligible Linn-Mar Community School District employee shall be entitled to family and medical leave for one or more of the following:

- Because of the birth of a son or daughter of the employee and in order to care for such son or daughter.
- Because of the placement of a son or daughter with the employee for adoption or foster care.
- In order to care for the spouse, or a son, daughter, or parent of the employee if the spouse, son, daughter, or parent has a serious health condition.
- Because of a serious health condition that makes the employee unable to perform the functions of the position of such employee.
- Because of any qualifying exigency ~~(as Secretary shall, determined by regulation, determine)~~ arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.

*Servicemember Family Leave – In addition, an eligible employee who is the spouse, son, daughter, parent or next of kin of a covered servicemember who is recovering from a serious illness or injury sustained in the line of duty on active duty shall be entitled to a total of 26 workweeks of leave during a 12-month rolling period to care for the servicemember. The leave described in this paragraph shall only be available during a single 12-month rolling period, during which an eligible employee is entitled to a combined total of 26 weeks of all types of FMLA leave.*

While on leave designated as FMLA, employees are not expected nor required to perform work duties for or on behalf of Linn-Mar Community School District. An employee is required to substitute applicable and available paid leave for unpaid family and medical leave if such leave is provided in the employee's collective bargaining agreement or terms and conditions of employment. Leave for an employee's serious health condition, including workers' compensation leave (to the extent that it qualifies) will be designated as FMLA leave and will run concurrently with FMLA leave. The District will not provide paid leave in any situation in which the District would not

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Adopted 3/4/91 Reviewed 2/10; 1/11; 12/11 Revised 3/06; 2/09; 4/15/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) P.L. 103-3; Act 102 (a) (1), 107 Stat. 6, 9 (1993) §§ 20; 85.33, .34, .38(3); 216; 279.40; PL 110-181; Section 565, 585

PERSONNEL

Policy Title FAMILY AND MEDICAL LEAVE Code 403.7

normally provide any such paid leave. Employees eligible for family and medical leave must comply with the family and medical leave administrative rules and regulations prior to starting family and medical leave.

If an employee has been absent for one calendar week or more due to the employee's personal injury or illness, the employee is required to present a fitness-for-duty certificate from their physician prior to reporting back to work.

For purposes of this policy, "year" is defined as a 12-month period measured forward from the date the employee's first FMLA leave commenced.

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Adopted 3/4/91 Reviewed 2/10; 1/11; 12/11 Revised 3/06; 2/09; 4/15/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) P.L. 103-3; Act 102 (a) (1), 107 Stat. 6, 9 (1993) §§ 20;  
85.33, .34, .38(3); 216; 279.40; PL 110-181; Section 565, 585



## ADMINISTRATIVE REGULATIONS REGARDING EMPLOYEE FAMILY AND MEDICAL LEAVE

### A. School district notice.

1. The school district will post the notice in Exhibit 403.7-E9 regarding family and medical leave.
2. Information on the Family and Medical Leave Act and the Board policy on family and medical leave, including leave provisions and employee obligations will be on the District Intranet and through Human Resources.
3. When an employee requests family and medical leave, the school district will provide the employee with information listing the employee's obligations and requirements. Such information will include:
  - a. a statement clarifying whether the leave qualifies as family and medical leave and will, therefore, be deducted from the employee's annual 12-week entitlement;
  - b. a reminder that employees requesting family and medical leave for their own serious health condition, for that of an immediate family member or due to any qualifying exigency must furnish medical certification of the serious health condition and the consequences for failing to do so;
  - c. an explanation of the employee's right to substitute paid leave for family and medical leave including a description of when the school district requires substitution of paid leave and the conditions related to the substitution; and
  - d. a statement notifying employees that they must pay and must make arrangements for paying any premium or other payments to maintain health or other benefits.

### B. Eligible employees.

Employees are eligible for family and medical leave if two criteria are met.

1. The employee must have one year of service which need not be continuous, provided that a break-in-service does not exceed 7 years. Separate stints of employment will be counted for breaks-in-service of 7 years or longer if one of the following applies:
  - a. Break-in-service due to National Guard or Reserve military service obligation.
  - b. Written agreement reflecting an employer's intention to rehire the employee after the break-in-service

2. The employee has worked 1,250 hours for the District over the previous twelve months. Full-time professional employees who are exempt from the wage and hour law may be presumed to have worked the minimum hour requirement.

If the employee requesting leave is unable to meet the above criteria, the employee is not eligible for family and medical leave and the District will provide information as to the reason why the employee is not eligible:

- a. The employee fails to meet the 12-month service requirement and the number of months the employee has been employed by the District.
- b. The employee fails to meet the 1,250-hour requirement and the number of hours of service worked for the District during the appropriate 12-month period.

C. Employee requesting leave (two types of leave).

1. Foreseeable family and medical leave

- a. Definition – leave is foreseeable for the birth or placement of an adopted or foster child with the employee or for planned medical treatment.
- b. Employee must give at least thirty days notice for foreseeable leave including planned medical treatment for a serious injury or illness of a covered military service member unless not practicable. Failure to give the notice may result in the District counting the absences during the delay as non-FMLA absences.
- c. Employees must consult with the school district prior to scheduling planned medical treatment leave to minimize disruption to the school district. The scheduling is subject to the approval of the health care provider.
- d. In any case in which the necessity for a qualifying exigency leave is foreseeable, whether because the spouse, or a son, daughter, or parent of the employee is on active duty in the military, or because of notification of an impending call or order to active duty in support of a contingency operation, the employee shall provide such notice to the employer as is reasonable and practicable, regardless of how far in advance leave is foreseeable.

2. Unforeseeable family and medical leave

- a. Definition – leave is unforeseeable in such situations as emergency medical treatment or premature birth.
- b. Employee must give notice as soon as possible but no later than one to two work days after learning that leave will be necessary.
- c. A spouse or family member may give the notice if the employee is unable to personally give notice.

- D. Eligible family and medical leave determination (The school district may require the employee giving notice of the need for leave to provide reasonable documentation or a statement of family relationship).

1. **Six** purposes.

- a. The birth of a son or daughter of the employee and in order to care for that son or daughter prior to the first anniversary of the child's birth.
- b. The placement of a son or daughter with the employee for adoption or foster care and in order to care for that son or daughter prior to the first anniversary of the child's placement;
- c. To care for the spouse, son, daughter or parent of the employee if the spouse, son, daughter or parent has a serious health condition; or
- d. Employee's serious health condition that makes the employee unable to perform the essential functions of the employee's position.
- e. Because of any qualifying exigency arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active military duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.
- f. Because the employee is : \_\_\_\_the spouse; \_\_\_\_son or daughter; \_\_\_\_parent; or \_\_\_\_ next of kin of a covered service member with a serious injury or illness.

2. Medical certification.

When required:

- 1) Employees shall be required to present medical certification of the employee's serious health condition and inability to perform the essential functions of the job.
  - 2) Employees shall be required to present medical certification of the family member's serious health condition and that it is medically necessary for the employee to take leave to care for the family member.
  - 3) Employees shall be required to present a certification issued by the health care provider of the military service member being cared for by the employee, in the case of an employee unable to return to work because of a condition specified as military service member family leave.
  - 4) Employees shall be required to present certification of next of kin of an individual in the case of leave taken under military service member family leave.
- a. Employee's medical certification responsibilities:



- 1) The employee must obtain the certification from the health care provider who is treating the individual with the serious health condition.
  - 2) The school district may require the employee to obtain a second certification by a health care provider chosen by and paid for by the school district if the school district has reason to doubt the validity of the certification an employee submits. The second health care provider cannot, however, be employed by the school district on a regular basis.
  - 3) If the second health care provider disagrees with the first health care provider, then the school district may require a third health care provider to certify the serious health condition. This health care provider must be mutually agreed upon by the employee and the school district and paid for by the school district. This certification or lack of certification is binding upon both the employee and the school district.
  - 4) Employees taking military caregiver family and medical leave to care for a family service member cannot be required to obtain a second opinion or to provide recertification.
- b. Medical certification must be submitted within fifteen days after family and medical leave begins unless it is impracticable to do so. The school district may request recertification every thirty days as follows:
    - Upon expiration of period of incapacity specified on certification
    - If an extension to leave is requested
    - If significant change in certification (complications, duration/frequency of absences, nature/severity of illness)
    - If the District received information casting doubt upon continuing validity of certification
  - c. Family and medical leave requested for the serious health condition of the employee or to care for a family member with a serious health condition which is not supported by medical certification may be denied until such certification is provided.
  - d. The District may require that a request for a qualifying exigency be supported by a military Active Duty or Call to Active Duty certification issued at such time and in such manner as the regulation prescribe. If a military regulation requiring such certification is issued, the employee shall provide, in a timely manner, a copy of such certification to the District.

E. Spouses employed by the same employer

In any case in which a husband and wife entitled to leave are both employed by the District, the aggregate number of work weeks of leave to which both may be entitled may be limited to 12 work weeks during any rolling 12-month period, if such leave is taken:

1. Birth of a son or daughter of the employees or in order to care for such son or daughter.

2. Because of the placement of a son or daughter with the employee for adoption or foster care, or to care for the child after placement.
3. To care for the employee's parent with a serious health condition.
4. or military service member family leave the aggregate number of work weeks of leave to which both that husband and wife may be entitled may be
5. limited to 26 work weeks during the single 12 months rolling period if it is military service member family leave or a combination of military service member leave and other leave as described in paragraphs 1 through 3 above.

If the leave taken by the husband and wife includes other leave defined in paragraphs 1 through 3, the limitation of a 12 work week in a 12 month rolling period applies to that leave.

F. Entitlement.

1. Employees are entitled to twelve weeks unpaid family and medical leave per year. Employees who are the spouse, son, daughter, parent or next of kin of a covered military service member who is recovering from a serious illness or injury sustained in the line of duty on active duty shall be entitled to a combined total of 26 work weeks of leave per year to care for the service member and for other types of FMLA leave.
2. Year is defined as "rolling" – measured forward from the first day leave is used.
3. If insufficient leave is available, the school district may:
  - a. Deny the leave if entitlement is exhausted
  - b. Award leave available
  - c. Award leave in accordance with other provisions of board policy or the collective bargaining agreement.

G. Type of leave requested.

1. Continuous – employee will not report to work for set number of days or weeks.
2. Intermittent – employee requests family and medical leave for separate periods of time.
  - a. Intermittent leave is available for:
    - 1) Birth, adoption or foster care placement of child only with the school district's agreement.
    - 2) Serious health condition of the employee, spouse, parent, or child when medically necessary without the school district's agreement.
    - 3) Any qualifying exigency arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active military duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.

- 4) An eligible employee who is the spouse, son, daughter, parent or next of kin of a covered military service member to care for the military service member who is recovering from a serious illness or injury sustained in the line of duty on active duty.
    - b. In the case of foreseeable intermittent leave, the employee must schedule the leave to minimize disruption to the school district operation.
    - c. During the period of foreseeable intermittent leave, the school district may move the employee to an alternative position with equivalent pay and benefits. (*For instructional employees, see G below.*)
    - d. The District may require fit for duty certification every 30 days if the employee has used intermittent leave and “reasonable safety concerns exist regarding the employee’s ability to perform his or her duties.”
  3. Reduced work schedule – employee requests a reduction in the employee’s regular work schedule.
    - a. Reduced work schedule family and medical leave is available for:
      - 1) Birth, adoption or foster care placement and subject to the schools district’s agreement.
      - 2) Serious health condition of the employee, spouse, parent, or child when medically necessary.
      - 3) Any qualifying exigency arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active military duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.
      - 4) An eligible employee who is the spouse, son, daughter, parent, or next of kin of a covered military service member to care for the service member who is recovering from a serious illness or injury sustained in the line of duty on active duty.
    - b. In the case of foreseeable reduced work schedule leave, based on planned medical treatment for the employee the employee must schedule the leave to minimize disruption to the school district operation. The school district may move the employee to an alternative position with equivalent pay and benefits. (*for instructional employee, see G below*)
    - c. During the period of foreseeable reduced work schedule leave, based on planned medical treatment for the family member the school district may move the employee to an alternative position with equivalent pay and benefits. (*For instructional employees, see G below.*)

H. Special rules for instructional employees.

1. Definition – an instructional employee is one whose principal function is to teach and instruct students in a class, a small group or an individual setting.

This includes, but is not limited to, teachers, coaches, driver’s education instructors and special education assistants.

2. Instructional employees who request foreseeable medically necessary intermittent or reduced work schedule family and medical leave greater than twenty percent of the work days in the leave period may be required to:
  - a. Take leave for the entire period or periods of the planned medical treatment; or
  - b. Move to an available alternative position, with equivalent pay and benefits, but not necessarily equivalent duties, for which the employee is qualified.
3. Instructional employees who request continuous family and medical leave near the end of a semester may be required to extend the family and medical leave through the end of the semester. The number of weeks remaining before the end of a semester does not include scheduled school breaks, such as summer, winter or spring break.
  - a. If an instructional employee begins family and medical leave for any purpose more than five weeks before the end of a semester, the school district may require that the leave be continued until the end of the semester if the leave will last at least three weeks and the employee would return to work during the last three weeks of the semester if the leave was not continued.
  - b. If the employee begins family and medical leave for a purpose other than the employee's own serious health condition during the last five weeks of a semester, the school district may require that the leave be continued until the end of the semester if the leave will last more than two weeks and the employee would return to work during the last two weeks of the semester.
  - c. If the employee begins family and medical leave for a purpose other than the employee's own serious health condition during the last three weeks of the semester and the leave will last more than five working days, the school district may require the employee to continue taking leave until the end of the semester.
4. The entire period of leave taken under the special rules is credited as family and medical leave. The school district will continue to fulfill the school district's family and medical leave responsibilities and obligations, including the obligation to continue the employee's health insurance and other benefits, if an instructional employee's family and medical leave entitlement ends before the involuntary leave period expires.

I. Employee responsibilities while on family and medical leave.

1. Employee must continue to pay health care benefit contributions or other benefit contributions regularly paid by the employee unless employee elects not to continue the benefits.
2. The employee contribution payments will be deducted from any money owed to the employee or the employee will reimburse the school district at a time set by the superintendent or designee.

3. An employee who fails to make the health care contribution payments within thirty days after they are due will be notified that their coverage may be canceled if payment is not received within an additional fifteen days.
4. An employee may be asked to re-certify the medical necessity of family and medical leave for the serious medical condition of an employee or family member once every thirty days or sixth month in the condition of an absence and return the certification within fifteen days of the request.
5. The employee must notify the school district of the employee's intent to return to work at least once each month during their leave and at least two days prior to the conclusion of the family and medical leave.
6. If the employee has been absent for more than one calendar week or more the employee is required to present a fitness-for-duty certificate from their physician stating their ability to perform the essential job functions prior to reporting back to work. If an employee fails to provide a certificate, the employee will lose his/her right to reinstatement under the law unless the employee has requested additional FMLA leave.
7. If an employee intends not to return to work, the employee must immediately notify the school district, in writing, of the employee's intent not to return. The school district will cease benefits upon receipt of this notification.

J. Use of paid leave for family and medical leave.

An employee is required to substitute unpaid family and medical leave with any applicable paid leave available to the employee under board policy, individual contracts or the collective bargaining agreement. Paid leave includes, but is not limited to, sick leave, family illness leave, vacation, personal leave, bereavement leave and professional leave.

When the school district determines that paid leave is being taken for an FMLA reason, the school district will notify the employee that the paid leave will be counted as FMLA leave.

## ADMINISTRATIVE REGULATIONS REGARDING LICENSED EMPLOYEE FAMILY AND MEDICAL LEAVE DEFINITIONS

Active Duty – The term “active duty” means duty under a call or order to active duty in support of a contingency operation pursuant to specific enumerated provisions of Section 688 of Title 10 of the United States Code. Such active duty or call/order to active duty is only made to members of the National Guard or Reserve components or a retired member of the Regular Armed Forces or Reserve. Therefore, an employee may not take exigency leave if the servicemember is a member of the Regular Armed Forces.

Common law marriage – According to Iowa law, common law marriages exist when there is a present intent by the two parties to be married, continuous cohabitation, and a public declaration that the parties are husband and wife. There is no time factor that needs to be met in order for there to be a common law marriage.

Contingency Operation – The term “contingency operation” has the same meaning given such term in section 101(a)(13) of Title 10, United States Code.

Continuing treatment – A serious health condition involving continuing treatment by a health care provider includes any one or more of the following:

- A period of incapacity (i.e., inability to work, attend school or perform other regular daily activities due to the serious health condition, treatment for or recovery from) of more than three full consecutive calendar days and any subsequent treatment or period of incapacity relating to the same condition that also involves:
  - in-person treatment by a health care provider at least once within seven days of the first day of incapacity and;
  - a regimen of continuing treatment under the supervision of a health care provider or;
  - a second in-person visit to the health care provider for treatment (the necessity of which is determined by the health care provider) within 30 days of the first day of incapacity or
  - any period of incapacity due to pregnancy or for prenatal care. (Father may take FMLA leave for pregnant spouse’s prenatal care and appointments, including providing transportation, and to provide care after birth if spouse has serious health condition).
- Any period of incapacity or treatment for such incapacity due to a chronic serious health condition. A chronic serious health condition is one which:
  - requires periodic visits for treatment by a health care provider or by a nurse or physician’s assistant at least twice a year under direct supervision of a health care provider;
  - continues over an extended period of time (including recurring episodes of a single underlying condition); and
  - may cause episodic rather than a continuing period of incapacity (e.g., asthma, diabetes, epilepsy, etc.).

- Any period of incapacity which is permanent or long-term due to a condition for which treatment may not be effective. The employee or family member must be under the continuing supervision of, but need not be receiving active treatment by, a health care provider. Examples include Alzheimer's, a severe stroke or the terminal stages of a disease.
- Any period of absence to receive multiple treatments (including any period of recovery from) by a health care provider or by a provider of health care services under orders of, or on referral by a health care provider, either for restorative surgery after an accident or other injury, or for a condition that would likely result in a period of incapacity of more than three consecutive calendar days in the absence of medical intervention or treatment, such as cancer (chemotherapy, radiation, etc.), severe arthritis (physical therapy), kidney disease (dialysis).

Covered Servicemember – The term “covered servicemember” means a current member of the Armed Forces, including the National Guard and Reserves, and those on the temporary disability retired list (TDRL), but not including former members or member on the permanent disability retired list who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness. Generally, a former member of the military whose injury or illness manifests itself after the member's discharge from military service (except for those on the TDRL) is not a covered servicemember.

Eligible Employee – the district has more than 50 employees on the payroll at the time leave is requested. The employee has worked for the school district for one year of service which need not be continuous, provided that a break-in-service does not exceed 7 years. Separate stints of employment will be counted for breaks-in-service of 7 years or longer if one of the following applies:

- a) Break-in-service due to National Guard or Reserve military service obligation
- b) Written agreement reflecting an employer's intention to rehire the employee after the break-in-service

The employee has worked 1,250 hours for the District over the previous 12 months.

Essential Functions of the Job – those functions which are fundamental to the performance of the job. It does not include marginal functions.

Employment Benefits – all benefits provided or made available to employees by an employer, including group life insurance, health insurance, disability insurance, sick leave, annual leave, educational benefits, and pensions, regardless of whether such benefits are provided by a practice or written policy of an employer or through an “employee benefit plan.”

Family Member – individuals who meet the definition of son, daughter, spouse or parent, including parent of a covered servicemember, son or daughter of a covered servicemember, next of kin of a covered servicemember and son or daughter on active duty or call to active duty status.

Group Health Plan – any plan of, or contributed to by, an employer (including a self-insured plan) to provide health care (directly or otherwise) to the employer’s employees, former employees, or the families of such employees or former employees.

Health Care Provider –

- a doctor of medicine or osteopathy who is authorized to practice medicine or surgery by the state in which the doctor practices; or
- podiatrists, dentists, clinical psychologists, optometrists, and chiropractors (limited to treatment consisting of manual manipulation of the spine to correct a subluxation as demonstrated by X-ray to exist) authorized to practice in the state and performing within the scope of their practice as defined under state law; and
- physician assistants, nurse practitioners and nurse-midwives, and clinical social workers who are authorized to practice under state law and who are performing within the scope of their practice as defined under state law; and
- Christian Science practitioners listed with the First Church of Christ Scientist in Boston, Massachusetts; and
- any health care provider from whom an employer or a group health plan’s benefits manager will accept certification of the existence of a serious health condition to substantiate a claim for benefits; and
- a health care provider as defined above who practices in a country other than the United States who is licensed to practice in accordance with the laws and regulations of that country.

In loco parentis – individuals who had or have day-to-day responsibilities for the care and financial support of a child not their biological child or who had the responsibility for an employee when the employee was a child.

Incapable of Self-Care – that the individual requires active assistance or supervision to provide daily self-care in several of the “activities of daily living” or “ADLs.” Activities of daily living include adaptive activities such as caring appropriately for one’s grooming and hygiene, bathing, dressing, eating, cooking, cleaning, shopping, taking public transportation, paying bills, maintaining a residence, using telephones and directories, using a post office, etc.

Instructional Employee – an employee employed principally in an instructional capacity by an educational agency or school whose principal function is to teach and instruct students in a class, a small group, or an individual setting, and includes athletic coaches, driving instructors, and special education assistants such as signers for the hearing impaired. The term does not include teacher assistants or aides who do not have as their principal function actual teaching or instructing, nor auxiliary personnel such as counselors, psychologists, curriculum specialists, cafeteria workers, maintenance workers, bus drivers, or other primarily non-instructional employees.

Intermittent Leave – leave taken in separate periods of time due to a single illness or injury, rather than for one continuous period of time, and may include leave or periods from an hour or more to several weeks.



Medically Necessary – certification for medical necessity is the same as certification for serious health condition.

“Needed to Care For” – the medical certification that an employee is “needed to care for” a family member encompasses both physical and psychological care. For example, where, because of a serious health condition, the family member is unable to care for his or her own basic medical, hygienic or nutritional needs or safety or is unable to transport himself or herself to medical treatment. It also includes situations where the employee may be needed to fill in for others who are caring for the family member or to make arrangements for changes in care. The employee does not need to be the only individual or family member available to provide the care nor is the employee required to provide actual care (e.g., someone else is providing inpatient or home care) as long as the employee is providing at least psychological comfort and reassurance.

Next of Kin – The term “next of kin”, used with respect to an individual, means the nearest blood relative of that individual.

Outpatient Status – The term “outpatient status”, with respect to a covered servicemember, means the status of a member of the Armed Forces assigned to –

- a) a military medical treatment facility as an outpatient; or
- b) a unit established for the purpose of providing command and control of members of the Armed Forces receiving medical care as outpatients.

Parent – a biological parent or an individual who stands *in loco parentis* to a child or stood *in loco parentis* to an employee when the employee was a child. Parent does not include parent-in-law.

Physical or Mental Disability – a physical or mental impairment that substantially limits one or more of the major life activities of an individual.

Qualifying Exigency – a non-medical activity that is directly related to the covered military member’s active duty or call to active duty status. For an activity to qualify as an exigency, it must fall within one of seven categories of activities or be mutually agreed to be the employer and employee. The seven categories of qualifying exigencies are short-notice deployment (leave permitted up to seven day if the military member received seven or less days’ notice of a call to active duty), military events and related activities, certain temporary childcare arrangements and school activities (but not ongoing childcare), financial and legal arrangements, counseling by a non-medical counselor (such as a member of the clergy), rest and recuperation (leave permitted up to five days when the military member is on temporary rest and recuperation leave), and post-deployment military activities.

Reduced Leave Schedule – a leave schedule that reduces the usual number of hours per work week, or hours per workday, of an employee.

Serious Health Condition –

- An illness, injury, impairment, or physical or mental condition that involves:
  - inpatient care (i.e., an overnight stay) in a hospital, hospice or residential medical care facility including any period of incapacity (for purposes of this section, defined to mean inability to work, attend school or perform other regular daily activities due to the serious health condition, treatment for or recovery from), or any subsequent treatment in connection with such inpatient care; or
  - Continuing treatment by a health care provider that either prevents the employee from performing the functions of the employee's job, or prevents the qualified family member from participating in school or other daily activities.
  - A serious health condition involving continuing treatment by a health care provider includes:
    - A period of incapacity (i.e., inability to work, attend school or perform other regular daily activities due to the serious health condition, treatment for or recovery from) of more than three full consecutive calendar days, including any subsequent treatment or period of incapacity relating to the same condition, that also involves:
      - in-person treatment by a health care provider at least once within seven days of the first day of incapacity and;
      - initiated by the health care provider during the first treatment or;
      - a second in-person visit to the health care provider for treatment (the necessity of which is determined by the health care provider) within 30 days of the first day of incapacity.
  - Any period of incapacity due to pregnancy or for prenatal care. (Father may take FMLA leave for pregnant spouse's prenatal care and appointments, including providing transportation, and to provide care after birth if spouse has serious health condition).
  - Any period of incapacity or treatment for such incapacity due to a chronic serious health condition. A chronic serious health condition is one which:
    - Requires periodic visits for treatment by a health care provider or by a nurse or physician's assistant at least twice a year under direct supervision of a health care provider;
    - Continues over an extended period of time (including recurring episodes of a single underlying condition); and
    - May cause episodic rather than a continuing period of incapacity (e.g., asthma, diabetes, epilepsy, etc.).
    - A period of incapacity which is permanent or long-term due to a condition for which treatment may not be effective. The employee or family member must be under the continuing supervision of, but need not be receiving active treatment by, a health care provider. Examples include Alzheimer's, a severe stroke or the terminal stages of a disease.

- Any period of absence to receive multiple treatments (including any period of recovery from) by a health care provider or by a provider of health care services under orders of, or on referral by, a health care provider, either for restorative surgery after an accident or other injury, or for a condition that would likely result in a period of incapacity of more than three consecutive calendar days in the absence of medical intervention or treatment, such as cancer (chemotherapy, radiation, etc.), severe arthritis (physical therapy), kidney disease (dialysis).
- Treatment for purposes of this definition includes, but is not limited to, examinations to determine if a serious health condition exists and evaluation of the condition. Treatment does not include routine physical examinations, eye examinations or dental examinations. Under this definition, a regimen of continuing treatment includes, for example, a course of prescription medication (e.g., an antibiotic) or therapy requiring special equipment to resolve or alleviate the health condition (e.g., oxygen). A regimen of continuing treatment that includes the taking of over-the-counter medications such as aspirin, antihistamines, or salves; or bed rest, drinking fluids, exercise and other similar activities that can be initiated without a visit to a health care provider, is not, by itself, sufficient to constitute a regimen of continuing treatment for purposes of FMLA leave.
- Conditions for which cosmetic treatments are administered (such as most treatments for acne or plastic surgery) are not “serious health conditions” unless inpatient hospital care is required or unless complications develop. Ordinarily, unless complications arise, the common cold, the flu, ear aches, upset stomach, ulcers, headaches other than migraine, routine dental or orthodontia problems, periodontal disease, etc., are examples of conditions that do not meet the definition of a serious health condition and do not qualify for FMLA leave. Restorative dental or plastic surgery after an injury or removal of cancerous growths are serious health conditions provided all the other conditions of this regulation are met. Mental illness resulting from stress or allergies may be serious health conditions, but only if all the conditions of this section are met.
- Substance abuse may be a serious health condition if the conditions of this section are met. However, FMLA leave may only be taken for treatment for substance abuse by a health care provider or by a provider of health care on referral by a health care provider. On the other hand, absence because of the employee’s use of the substance, rather than treatment, does not qualify for FMLA leave.
- Absence attributable to incapacity under this definition qualify for FMLA leave even though the employee or the immediate family member does not receive treatment from a health care provider during the absence, and even if the absence does not last more than three days. For example, an employee with asthma may be unable to report for work due to the onset of an asthma attack or because the employee’s health care provider has advised the employee to stay home when the pollen count exceeds a certain level. An employee who is pregnant may be unable to report to work because of severe morning sickness.

Serious Injury or Illness – The term “serious injury or illness”, in the case of a member of the Armed Forces, including a member of the National Guard or Reserves, means an injury or illness incurred by the member in line of duty on active duty in the Armed Forces that may render the member medically unfit to perform the duties of the member’s office, grade, rank or rating.

Son or Daughter – a biological child, adopted child, foster child, stepchild, legal ward, or a child of a person standing *in loco parentis*. The child must be under age 18 or, if over 18, incapable of self-care because of a mental physical disability.

Spouse – a husband or wife recognized by Iowa law including common law marriages.

# Linn-Mar Community School District

## FMLA Leave Request and Employee Obligation / Requirement Form



I, \_\_\_\_\_, request family and medical leave for the following reason(s):

(check all that apply)

- ☐ For the birth of my child (employees will be required to use the following leaves if available and applicable: personal illness, family illness, personal days, and paid vacation).
- ☐ For the placement of a child for adoption or foster care (employees will be required to use the following leaves if available and applicable: personal days and paid vacation).
- ☐ To care for my child who has a serious health condition (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).
- ☐ To care for my spouse who has a serious health condition (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).
- ☐ To care for my parent who has a serious health condition (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).
- ☐ Because I am seriously ill and unable to perform the essential functions of my position (employees will be required to use the following leaves if available and applicable: personal illness, personal days, and paid vacation).
- ☐ Because of any qualifying exigency arising out of the fact that my spouse, or son, or daughter, or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation (employees will be required to use the following leaves if available and applicable: personal days, paid vacation).
- ☐ Because I am the \_\_\_ spouse; \_\_\_ son or daughter; \_\_\_ parent; \_\_\_ next of kin of a covered service member with a serious injury or illness (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).

I understand that when the required paid leave has been used, the remainder of the twelve weeks under the Family Medical Leave Act shall be unpaid.

I acknowledge receipt of information regarding my obligations under the family and medical leave policy of the school district.

I request that my family and medical leave begin on \_\_\_\_\_, and I request leave as follows: (check one)

- ☐ Continuous: I anticipate that I will be able to return to work on \_\_\_\_\_
- ☐ Intermittent leave for the:
  - ☐ Birth of my child or adoption or foster care placement subject to agreement by the district.
  - ☐ Serious health condition of myself, child, spouse, or parent when medically necessary.
  - ☐ Because of any qualifying exigency arising out of the fact that my spouse, or son, or daughter, or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation (employees will be required to use the following leaves if available and applicable: personal days, paid vacation).
  - ☐ For the care of my \_\_\_ spouse; \_\_\_ son or daughter; \_\_\_ parent; \_\_\_ next of kin of a covered service member with a serious injury or illness (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).

Details of the needed intermittent leave:


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I anticipate returning to work at my regular schedule on \_\_\_\_\_

\_\_\_\_\_ Reduced work schedule for the:

\_\_\_\_\_ Birth of my child or adoption or foster care placement subject to agreement by the district.

\_\_\_\_\_ Serious health condition of myself, child, spouse, or parent when medically necessary.

\_\_\_\_\_ Because of any qualifying exigency arising out of the fact that my spouse, or son, or daughter, or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation (employees will be required to use the following leaves if available and applicable: personal days, paid vacation).

\_\_\_\_\_ For the care of my \_\_\_\_\_ spouse; \_\_\_\_\_ son or daughter; \_\_\_\_\_ parent; \_\_\_\_\_ next of kin of a covered service member with a serious injury or illness (employees will be required to use the following leaves if available and applicable: family illness, personal days, and paid vacation).

Details of needed reduction in work schedule as follows:


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I anticipate returning to work at my regular schedule on \_\_\_\_\_.

I realize I may be moved to an alternative position during the period of the family and medical intermittent or reduced work schedule leave. I also realize that with foreseeable intermittent or reduced work schedule leave, subject to the requirements of my health care provider, I may be required to schedule the leave to minimize the impact on school district operations.

While on family and medical leave, I agree to pay my regular contributions to employer-sponsored benefit plans. My contributions shall be deducted from monies owed me during the leave period. If no monies are owed me, I shall reimburse the school district by personal check (cash) for my contributions. I understand that I may be dropped from employer-sponsored benefit plans for failure to pay my contribution.

I agree to reimburse the school district for any payment of my contributions with deductions from future monies owed to me or the school district may seek reimbursement for payments of my contributions in court.

I acknowledge my obligation to provide medical certification within 15 days of filing this request for my serious health condition or that of a family member in order to be eligible for family and medical leave and that I have received the appropriate medical form.

I acknowledge that if this request for leave qualifies as family and medical leave it will be deducted from my annual twelve-week entitlement.

I acknowledge that the above information is true to the best of my knowledge.

\_\_\_\_\_  
Employee's Printed Name

\_\_\_\_\_  
Employee's Signature

Date

**Return to:**  
**Linn-Mar Community School District**  
**Office of Human Resources**  
**2999 North 10<sup>th</sup> Street**  
**Marion, IA 52302**  
**FAX: 319-377-9252**

Linn-Mar Community School District  
Notice of Eligibility and Rights and  
Responsibilities  
(Family and Medical Leave Act)

U.S. Department of Labor  
Employment Standards Administration Wage  
and Hour Division



OMB Control Number: 1215-0181

Expires: 12/31/2011

In general, to be eligible an employee must have worked for an employer for at least 12 months, have worked at least 1,250 hours in the 12 months preceding the leave, and work at a site with at least 50 employees within 75 miles. While use of this form by employers is optional, a fully completed Form WH-381 provides employees with the information required by 29 C.F.R. § 825.300(b), which must be provided within five business days of the employee notifying the employer of the need for FMLA leave. Part B provides employees with information regarding their rights and responsibilities for taking FMLA leave, as required by 29 C.F.R. § 825.300(b), (c).

**Part A – NOTICE OF ELIGIBILITY**

TO: \_\_\_\_\_  
Employee

FROM: Linn-Mar Office of Human Resources

DATE: \_\_\_\_\_

On \_\_\_\_\_, (1) \_\_\_\_\_ you informed us that you needed leave beginning on \_\_\_\_\_ OR  
(2) \_\_\_\_\_ we learned of your need to take leave beginning on \_\_\_\_\_ for:

\_\_\_\_\_ The birth of a child, or placement of a child with you for adoption or foster care.

\_\_\_\_\_ Your own serious health condition.

\_\_\_\_\_ Because you are needed to care for your \_\_\_\_\_ spouse; \_\_\_\_\_ child; \_\_\_\_\_ parent due to his/her serious health condition.

\_\_\_\_\_ Because of a qualifying exigency arising out of the fact that your \_\_\_\_\_ spouse; \_\_\_\_\_ son or daughter; \_\_\_\_\_ parent is on active duty or call to active duty status in support of a contingency operation as a member of the National Guard or Reserves.

\_\_\_\_\_ Because you are the \_\_\_\_\_ spouse; \_\_\_\_\_ son or daughter; \_\_\_\_\_ parent; \_\_\_\_\_ next of kin of a covered servicemember with a serious injury or illness.

This Notice is to inform you that you:

\_\_\_\_\_ Are eligible for FMLA leave (See Part B below for Rights and Responsibilities)

\_\_\_\_\_ Are **not** eligible for FMLA leave, because (only one reason need be checked, although you may not be eligible for other reasons):

\_\_\_\_\_ You have not met the FMLA's 12-month length of service requirement. As of the first date of requested leave, you will have worked approximately \_\_\_\_\_ months towards this requirement.

\_\_\_\_\_ You have not met the FMLA's 1,250-hours-worked requirement.

If you have any questions, contact Cathy Gauger, Benefits and Leave Specialist or view the document, Employee Rights and Responsibilities Under the Family and Medical Leave Act, found on Linn-Mar's Intranet.

**PART B – RIGHTS AND RESPONSIBILITIES FOR TAKING FMLA LEAVE**

As explained in Part A, you meet the eligibility requirements for taking FMLA leave and still have FMLA leave available in the applicable 12-month period. **However, in order for us to determine whether your absence qualifies as FMLA leave, you must return the following information to us by \_\_\_\_\_.** (If a certification is requested, employers must allow at least 15 calendar days from receipt of this notice; additional time may be required in some circumstances.) If sufficient information is not provided in a timely manner, your leave may be denied.

\_\_\_\_\_ Sufficient certification to support your request for FMLA leave. A certification form that sets forth the information necessary to support your request \_\_\_\_\_ **is/** \_\_\_\_\_ **is not** enclosed.

\_\_\_\_\_ Sufficient documentation to establish the required relationship between you and your family member.

\_\_\_\_\_ Other information needed: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ No additional information requested

If your leave does qualify as FMLA leave you will have the following **responsibilities** while on FMLA leave (only checked blanks apply):

If you normally pay a portion of the premiums for your health insurance, these payments will continue during the period of FMLA leave.

Board provided insurance contribution per current contract:

Health and major medical insurance premium:	Up to \$ _____/month toward premium
Long-term disability insurance premium:	District paid
Basic life insurance premium:	District paid
Full single dental insurance premium:	If applicable

\_\_\_\_\_ Contact the \_\_\_\_\_ Linn-Mar Office of Human Resources \_\_\_\_\_ to make arrangements to continue to make your share of the premium payments on your health insurance to maintain health benefits while you are on leave. You have a minimum 30-day (or, indicate longer period, if applicable) grace period in which to make premium payments. If payment is not made timely, your group health insurance may be cancelled, provided we notify you in writing at least 15 days before the date that your health coverage will lapse. We will not pay your share of *health, dental or additional life insurance premiums* while you are on leave.

\_\_\_\_\_ You will be required to use your available paid \_\_\_\_\_ **sick leave**, \_\_\_\_\_ **personal leave**, and/or \_\_\_\_\_ **other leave**: \_\_\_\_\_ during your FMLA absence. This means that you will receive your paid leave and the leave will also be considered protected FMLA leave and counted against your FMLA leave entitlement.

\_\_\_\_\_ Due to your status within the company, you are considered a “key employee” as defined in the FMLA. As a “key employee,” restoration to employment may be denied following FMLA leave on the grounds that such restoration will cause substantial and grievous economic injury to us. We \_\_\_\_\_ **have**/\_\_\_\_\_ **have not** determined that restoring you to employment at the conclusion of FMLA leave will cause substantial and grievous economic harm to us.

\_\_\_\_\_ While on leave you will be required to furnish us with periodic reports of your status and intent to return to work every \_\_\_\_\_. (Indicate interval of periodic reports, as appropriate for the particular leave situation).

\_\_\_\_\_ You will be required to furnish recertification relating to a serious health condition. *Explain below, if necessary, including the interval between certifications as prescribed in § 825.308 of the FMLA regulations.*

**If the circumstances of your leave change, and you are able to return to work earlier than the date indicated on the reverse side of this form, you will be required to notify us at least two workdays prior to the date you intend to report for work.**

If your leave does qualify as FMLA leave you will have the following **rights** while on FMLA leave:

- You have a right under the FMLA for up to 12 weeks of unpaid leave in a 12-month period calculated as a “rolling” 12-month period measured forward from the date of any FMLA leave usage. This 12-month period commenced on \_\_\_\_\_.
- You have a right under the FMLA for up to 26 weeks of unpaid leave in a single 12-month period to care for a covered servicemember with a serious injury or illness. This single 12-month period commenced on \_\_\_\_\_.
- Your health benefits must be maintained during any period of unpaid leave under the same conditions as if you continued to work.
- You must be reinstated to the same or an equivalent job with the same pay, benefits, and terms and conditions of employment on your return from FMLA-protected leave. (If your leave extends beyond the end of your FMLA entitlement, you do not have return rights under FMLA.)
- If you do not return to work following FMLA leave for a reason other than: 1) the continuation, recurrence, or onset of a serious health condition which would entitle you to FMLA leave; 2) the continuation, recurrence, or onset of a covered servicemember’s serious injury or illness which would entitle you to FMLA leave; or 3) other circumstances beyond your control, you may be required to reimburse us for our share of health insurance premiums paid on your behalf during your FMLA leave.
- If we have not informed you above that you must use accrued paid leave while taking your unpaid FMLA leave entitlement, you have the right to have \_\_\_\_\_ **sick leave**, \_\_\_\_\_ **personal leave**, and/or \_\_\_\_\_ **other leave** run concurrently with your unpaid leave entitlement, provided you meet any applicable requirements of the leave policy. Applicable conditions related to the substitution of paid leave are referenced or set forth below. If you do not meet the requirements for taking paid leave, you remain entitled to take unpaid FMLA leave.

**Once we obtain the information from you as specified above, we will inform you, within 5 business days, whether your leave will be designated as FMLA leave and count towards your FMLA leave entitlement. If you have any questions, please do not hesitate to contact:**

\_\_\_\_\_ Cathy Gauger, Benefits and Leave Specialist \_\_\_\_\_ at \_\_\_\_\_ 447-3011 \_\_\_\_\_.

#### PAPERWORK REDUCTION ACT NOTICE AND PUBLIC BURDEN STATEMENT

It is mandatory for employers to provide employees with notice of their eligibility for FMLA protection and their rights and responsibilities. 29 U.S.C. § 2617; 29 C.F.R. § 825.300(b), (c). It is mandatory for employers to retain a copy of this disclosure in their records for three years. 29 U.S.C. § 2616; 29 C.F.R. § 825.500. Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. The Department of Labor estimates that it will take an average of 10 minutes for respondents to complete this collection of information, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. If you have any comments regarding this burden estimate or any other aspect of this collection information, including suggestions for reducing this burden, send them to the Administrator, Wage and Hour Division, U.S. Department of Labor, Room S-3502, 200 Constitution Ave., NW, Washington, DC 20210.

**DO NOT SEND THE COMPLETED FORM TO THE WAGE AND HOUR DIVISION.**



Linn-Mar Community School District  
Designation Notice  
(Family and Medical Leave Act)

U.S. Department of Labor  
Employment Standards Administration  
Wage and Hour Division



OMB Control Number: 1215-0181  
Expires: 12/31/2011

Leave covered under the Family and Medical Leave Act (FMLA) must be designated as FMLA-protected and the employer must inform the employee of the amount of leave that will be counted against the employee's FMLA leave entitlement. In order to determine whether leave is covered under the FMLA, the employer may request that the leave be supported by a certification. If the certification is incomplete or insufficient, the employer must state in writing what additional information is necessary to make the certification complete and sufficient. While use of this form by employers is optional, a fully completed Form WH-382 provides an easy method of providing employees with the written information required by 29 C.F.R. §§ 825.300(c), 825.301, and 825.305(c).

To: \_\_\_\_\_

From: Cathy Gauger, Benefits and Leave Specialist

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

We have reviewed your request for leave under the FMLA and any supporting documentation that you have provided. We received your most recent information on \_\_\_\_\_ and decided:

\_\_\_\_\_ **Your FMLA leave request is approved. All leave taken for this reason will be designated as FMLA leave.**

**The FMLA requires that you notify us as soon as practicable if dates of scheduled leave change or are extended, or were initially unknown. Based on the information you have provided to date, we are providing the following information about the amount of time that will be counted against your leave entitlement:**

\_\_\_\_\_ Provided there is no deviation from your anticipated leave schedule, the following number of hours, days, or weeks will be counted against your leave entitlement: \_\_\_\_\_

\_\_\_\_\_ Because the leave you will need will be unscheduled, it is not possible to provide the hours, days, or weeks that will be counted against your FMLA entitlement at this time. You have the right to request this information once in a 30-day period (if leave was taken in the 30-day period).

**Please be advised (check if applicable):**

\_\_\_\_\_ We are requiring you to substitute or use paid leave during your FMLA leave as follows:

*(dates of leave; number of days used; anticipated return-to-work date)*

\_\_\_\_\_ You will be required to present a fitness-for-duty certificate (403.7-E8) to be restored to employment. If such certification is not timely received, your return to work may be delayed until certification is provided. A list of the essential functions of your position ☐ **is** ☐ **is not** attached. If attached, the fitness-for-duty certification must address your ability to perform these functions.

\_\_\_\_\_ **Additional information is needed to determine if your FMLA leave request can be approved:**

\_\_\_\_\_ The certification you have provided is not complete and sufficient to determine whether the FMLA applies to your leave request. You must provide the following information no later than \_\_\_\_\_, unless it is not  
(Provide at least seven calendar days)  
practicable under the particular circumstances despite your diligent good faith efforts, or your leave may be denied.

(Specify information needed to make the certification complete and sufficient)

\_\_\_\_\_ We are exercising our right to have you obtain a second or third opinion medical certification at our expense, and we will provide further details at a later time.

\_\_\_\_\_ Your FMLA Leave request is Not Approved.

\_\_\_\_\_ The FMLA does not apply to your leave request.

\_\_\_\_\_ You have exhausted your FMLA leave entitlement in the applicable 12-month period.

**PAPERWORK REDUCTION ACT NOTICE AND PUBLIC BURDEN STATEMENT**

It is mandatory for employers to inform employees in writing whether leave requested under the FMLA has been determined to be covered under the FMLA. 29 U.S.C. § 2617; 29 C.F.R. §§ 825.300(d), (e). It is mandatory for employers to retain a copy of this disclosure in their records for three years. 29 U.S.C. § 2616; 29 C.F.R. § 825.500. Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. The Department of Labor estimates that it will take an average of 10 - 30 minutes for respondents to complete this collection of information, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. If you have any comments regarding this burden estimate or any other aspect of this collection information, including suggestions for reducing this burden, send them to the Administrator, Wage and Hour Division, U.S. Department of Labor, Room S-3502, 200 Constitution Ave., NW, Washington, DC 20210. **DO NOT SEND THE COMPLETED FORM TO THE WAGE AND HOUR DIVISION.**

Form WH-382 Reviewed 9/2014

**Linn-Mar Community School District  
Certification of Health Care Provider for  
Employee's Serious Health Condition  
(Family and Medical Leave Act)**

**U.S. Department of Labor**  
Employment Standards Administration Wage  
and Hour Division



OMB Control Number: 1215-0181

Expires: 12/31/2011

**SECTION I: For Completion by the EMPLOYER**

**INSTRUCTIONS to the EMPLOYER:** The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact: Linn-Mar Community School District – Karla Christian, Exec. Director of Human Resources

Employee's job title: \_\_\_\_\_

Regular work schedule: \_\_\_\_\_

Employee's essential job functions: \_\_\_\_\_

Check if job description is attached: \_\_\_\_\_

**SECTION II: For Completion by the EMPLOYEE**

**INSTRUCTIONS to the EMPLOYEE:** Please complete Section II before giving this form to your medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to your own serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 20 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form. 29 C.F.R. § 825.305(b).

Your name: \_\_\_\_\_  
First Middle Last

**SECTION III: For Completion by the HEALTH CARE PROVIDER**

**INSTRUCTIONS to the HEALTH CARE PROVIDER:** Your patient has requested leave under the FMLA. Answer, fully and completely, all applicable parts. Several questions seek a response as to the frequency or duration of a condition, treatment, etc. Your answer should be your best estimate based upon your medical knowledge, experience, and examination of the patient. Be as specific as you can; terms such as "lifetime," "unknown," or "indeterminate" may not be sufficient to determine FMLA coverage. Limit your responses to the condition for which the employee is seeking leave. Please be sure to sign the form on the last page.

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by this law. To comply with this law, **we are asking that you not provide any genetic information when responding to this request for medical information.** "Genetic Information" as defined by GINA includes an individual's family medical history, the results of an individual's or family member's genetic tests, the fact that an individual or an individual's family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

**PLEASE PRINT**

Provider's name: \_\_\_\_\_

Provider's business address: \_\_\_\_\_

Type of practice / Medical specialty: \_\_\_\_\_

Telephone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

**PART A: MEDICAL FACTS**

1. Approximate date condition commenced: \_\_\_\_\_

Probable duration of condition: \_\_\_\_\_

**Mark below as applicable:**

Was the patient admitted for an overnight stay in a hospital, hospice, or residential medical care facility?

\_\_\_ No \_\_\_ Yes. If so, dates of admission: \_\_\_\_\_

Date(s) you treated the patient for condition:

\_\_\_\_\_

Will the patient need to have treatment visits at least twice per year due to the condition? \_\_\_No \_\_\_ Yes.

Was medication, other than over-the-counter medication, prescribed? \_\_\_No \_\_\_Yes.

Was the patient referred to other health care provider(s) for evaluation or treatment (e.g., physical therapist)?

\_\_\_ No \_\_\_ Yes. If so, state the nature of such treatments and expected duration of treatment:

2. Is the medical condition pregnancy? \_\_\_ No \_\_\_ Yes. If so, expected delivery date: \_\_\_\_\_

3. Use the information provided by the employer in Section I to answer this question. If the employer fails to provide a list of the employee's essential functions or a job description, answer these questions based upon the employee's own description of his/her job functions.

Is the employee unable to perform any of his/her job functions due to the condition: \_\_\_ No \_\_\_ Yes.

If so, identify the job functions the employee is unable to perform:

\_\_\_\_\_  
\_\_\_\_\_

4. Describe other relevant medical facts, if any, related to the condition for which the employee seeks leave (such medical facts may include symptoms, diagnosis, or any regimen of continuing treatment such as the use of specialized equipment):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PART B: AMOUNT OF LEAVE NEEDED**

5. Will the employee be incapacitated for a single continuous period of time due to his/her medical condition, including any time for treatment and recovery? ☐ No ☐ Yes.

If so, estimate the beginning and ending dates for the period of incapacity: \_\_\_\_\_

6. Will the employee need to attend follow-up treatment appointments or work part-time or on a reduced schedule because of the employee's medical condition? ☐ No ☐ Yes.

If so, are the treatments or the reduced number of hours of work medically necessary? ☐ No ☐ Yes.

Estimate treatment schedule, if any, including the dates of any scheduled appointments and the time required for each appointment, including any recovery period:

Estimate the part-time or reduced work schedule the employee needs, if any: \_\_\_\_\_ hour(s) per day;  
\_\_\_\_\_ days per week from \_\_\_\_\_ through \_\_\_\_\_

7. Will the condition cause episodic flare-ups periodically preventing the employee from performing his/her job functions? ☐ No ☐ Yes.

Is it medically necessary for the employee to be absent from work during the flare-ups?  
☐ No ☐ Yes. If so, explain:

\_\_\_\_\_  
\_\_\_\_\_

Based upon the patient's medical history and your knowledge of the medical condition, estimate the frequency of flare-ups and the duration of related incapacity that the patient may have over the next 6 months (e.g., 1 episode every 3 months lasting 1-2 days):

Frequency: \_\_\_\_\_ times per \_\_\_\_\_ week(s) \_\_\_\_\_ month(s)

Duration: \_\_\_\_\_ hours or \_\_\_\_\_ day(s) per episode

**ADDITIONAL INFORMATION: IDENTIFY QUESTION NUMBER WITH YOUR ADDITIONAL ANSWER.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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Signature of Health Care Provider

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Date

**PAPERWORK REDUCTION ACT NOTICE AND PUBLIC BURDEN STATEMENT**

If submitted, it is mandatory for employers to retain a copy of this disclosure in their records for three years. 29 U.S.C. § 2616; 29 C.F.R. § 825.500. Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. The Department of Labor estimates that it will take an average of 20 minutes for respondents to complete this collection of information, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. If you have any comments regarding this burden estimate or any other aspect of this collection information, including suggestions for reducing this burden, send them to the Administrator, Wage and Hour Division, U.S. Department of Labor, Room S-3502, 200 Constitution Ave., NW, Washington, DC 20210. **DO NOT SEND COMPLETED FORM TO THE DEPARTMENT OF LABOR.**

**RETURN TO THE PATIENT or the  
LINN-MAR COMMUNITY SCHOOL DISTRICT  
OFFICE OF HUMAN RESOURCES  
2999 NORTH 10<sup>TH</sup> STREET  
MARION, IA 52302  
FAX No. 319-377-9252**

**Linn-Mar Community School District  
Certification of Health Care Provider for  
Family Member's Serious Health Condition  
(Family and Medical Leave Act)**

**U.S. Department of Labor**  
Employment Standards Administration Wage  
and Hour Division



OMB Control Number: 1215-0181  
Expires: 12/31/2011

**SECTION I: For Completion by the EMPLOYER**

**INSTRUCTIONS to the EMPLOYER:** The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave to care for a covered family member with a serious health condition to submit a medical certification issued by the health care provider of the covered family member. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees' family members, created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact : **Linn-Mar Community School District**  
**Cathy Gauger, Benefits and Leave Specialist**

**SECTION II: For Completion by the EMPLOYEE**

**INSTRUCTIONS to the EMPLOYEE:** Please complete Section II before giving this form to your family member or his/her medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave to care for a covered family member with a serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 29 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form to your employer. 29 C.F.R. § 825.305.

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual except as specifically allowed by this law. To comply with this law, we are asking that you not provide any genetic information when responding to this request for medical information. "Genetic Information" as defined by GINA includes an individual's family medical history, the results of an individual's or family members' genetic tests, the fact that an individual or an individual's family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

**PLEASE PRINT**

Your name: \_\_\_\_\_  
First Middle Last

Name of family member  
for whom you will provide care: \_\_\_\_\_  
First Middle Last

Relationship of family member to you: \_\_\_\_\_

If family member is your son or daughter, date of birth: \_\_\_\_\_

Describe care you will provide to your family member and estimate leave needed to provide care:

\_\_\_\_\_  
Employee Printed Name

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**SECTION III: For Completion by the HEALTH CARE PROVIDER**

**INSTRUCTIONS to the HEALTH CARE PROVIDER:** The employee listed above has requested leave under the FMLA to care for your patient. Answer, fully and completely, all applicable parts below. Several questions seek a response as to the frequency or duration of a condition, treatment, etc. Your answer should be your best estimate based upon your medical knowledge, experience, and examination of the patient. Be as specific as you can; terms such as "lifetime," "unknown," or "indeterminate" may not be sufficient to determine FMLA coverage. Limit your responses to the condition for which the patient needs leave. Page 3 provides space for additional information, should you need it. Please be sure to sign the form on the last page.

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual except as specifically allowed by this law. To comply with this law, we are asking that you not provide any genetic information when responding to this request for medical information. "Genetic Information" as defined by GINA includes an individual's family medical history, the results of an individual's or family members' genetic tests, the fact that an individual or an individual's family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

Provider's name: (PLEASE PRINT) \_\_\_\_\_

Provider's business address: \_\_\_\_\_

Type of practice / Medical specialty: \_\_\_\_\_

Telephone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

**PART A: MEDICAL FACTS**

1. Approximate date condition commenced: \_\_\_\_\_

Probable duration of condition: \_\_\_\_\_

Was the patient admitted for an overnight stay in a hospital, hospice, or residential medical care facility?

\_\_\_ No \_\_\_ Yes. If so, dates of admission: \_\_\_\_\_

Date(s) you treated the patient for condition: \_\_\_\_\_

Was medication, other than over-the-counter medication, prescribed? \_\_\_ No \_\_\_ Yes

Will the patient need to have treatment visits at least twice per year due to the condition? \_\_\_ No \_\_\_ Yes

Was the patient referred to other health care provider(s) for evaluation or treatment (e.g., physical therapist)?

\_\_\_ No \_\_\_ Yes. If so, state the nature of such treatments and expected duration of treatment:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Is the medical condition pregnancy? ☐ No ☐ Yes. If so, expected delivery date: \_\_\_\_\_
3. Describe other relevant medical facts, if any, related to the condition for which the patient needs care (such as medical facts may include symptoms, diagnosis, or any regimen of continuing treatment such as the use of specialized equipment):

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**PART B: AMOUNT OF CARE NEEDED:**

When answering these questions, keep in mind that your patient's need for care by the employee seeking leave may include assistance with basic medical, hygienic, nutritional, safety or transportation needs, or the provision of physical or psychological care:

4. Will the patient be incapacitated for a single continuous period of time, including any time for treatment and recovery? ☐ No ☐ Yes

Estimate the beginning and ending dates for the period of incapacity: \_\_\_\_\_

During this time, will the patient need care? ☐ No ☐ Yes

Explain the care needed by the patient and why such care is medically necessary:

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5. Will the patient require follow-up treatments, including any time for recovery? ☐ No ☐ Yes

Estimate treatment schedule, if any, including the dates of any scheduled appointments and the time required for each appointment, including any recovery period:

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Explain the care needed by the patient, and why such care is medically necessary: \_\_\_\_\_

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6. Will the patient require care on an intermittent or reduced schedule basis, including any time for recovery? ☐ No ☐ Yes.

Estimate the hours the patient needs care on an intermittent basis, if any:

\_\_\_\_\_ hour(s) per day; \_\_\_\_\_ days per week from \_\_\_\_\_ through \_\_\_\_\_

Explain the care needed by the patient, and why such care is medically necessary:

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7. Will the condition cause episodic flare-ups periodically preventing the patient from participating in normal daily activities? \_\_\_\_ No \_\_\_\_ Yes.

Based upon the patient's medical history and your knowledge of the medical condition, estimate the frequency of flare-ups and the duration of related incapacity that the patient may have over the next 6 months (e.g., 1 episode every 3 months lasting 1-2 days):

Frequency: \_\_\_\_\_ times per \_\_\_\_\_ week(s) \_\_\_\_\_ month(s)

Duration: \_\_\_\_\_ hours or \_\_\_\_\_ day(s) per episode

Does the patient need care during these flare-ups? \_\_\_\_ No \_\_\_\_ Yes

Explain the care needed by the patient, and why such care is medically necessary: \_\_\_\_\_

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ADDITIONAL INFORMATION: IDENTIFY QUESTION NUMBER WITH YOUR ADDITIONAL ANSWER.

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\_\_\_\_\_  
Signature of Health Care Provider

\_\_\_\_\_  
Date

**PAPERWORK REDUCTION ACT NOTICE AND PUBLIC BURDEN STATEMENT**

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**RETURN TO THE PATIENT or the  
LINN-MAR COMMUNITY SCHOOL DISTRICT  
OFFICE OF HUMAN RESOURCES  
2999 NORTH 10<sup>TH</sup> STREET  
MARION, IA 52302  
FAX No.: (319) 377-9252**



## PART A: QUALIFYING REASON FOR LEAVE

1. Describe the reason you are requesting FMLA leave due to a qualifying exigency (including the specific reason you are requesting leave):

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2. A complete and sufficient certification to support a request for FMLA leave due to a qualifying exigency includes any available written documentation which supports the need for leave; such documentation may include a copy of a meeting announcement for informational briefings sponsored by the military, a document confirming an appointment with a counselor or school official, or a copy of a bill for services for the handling of legal or financial affairs. Available written documentation supporting this request for leave is attached.  
\_\_\_ No \_\_\_ Yes \_\_\_ None Available

## PART B: AMOUNT OF LEAVE NEEDED

1. Approximate date exigency commenced: \_\_\_\_\_

Probable duration of exigency: \_\_\_\_\_

2. Will you need to be absent from work for a single continuous period of time due to the qualifying exigency?  
\_\_\_ No \_\_\_ Yes

If so, estimate the beginning and ending dates for the period of absence:

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3. Will you need to be absent from work periodically to address this qualifying exigency? \_\_\_ No \_\_\_ Yes

Estimate schedule of leave, including the dates of any scheduled meetings or appointments:

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Estimate the frequency and duration of each appointment, meeting, or leave event, including any travel time (i.e., 1 deployment-related meeting every month lasting 4 hours):

Frequency: \_\_\_\_\_ times per \_\_\_\_\_ week(s) \_\_\_\_\_ month(s)

Duration: \_\_\_\_\_ hours \_\_\_\_\_ day(s) per event.

**PART C:**

If leave is requested to meet with a third party (such as to arrange for childcare, to attend counseling, to attend meetings with school or childcare providers, to make financial or legal arrangements, to act as the covered military member's representative before a federal, state, or local agency for purposes of obtaining, arranging or appealing military service benefits, or to attend any event sponsored by the military or military service organizations), a complete and sufficient certification includes the name, address, and appropriate contact information of the individual or entity with whom you are meeting (i.e., either the telephone or fax number or email address of the individual or entity). This information may be used by your employer to verify that the information contained on this form is accurate.

Name of Individual: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Describe nature of meeting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PART D:**

I certify that the information I provided above is true and correct.

\_\_\_\_\_  
Employee Printed Name

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date

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**RETURN TO:**  
**LINN-MAR COMMUNITY SCHOOL DISTRICT**  
**OFFICE OF HUMAN RESOURCES**  
**2999 NORTH 10<sup>TH</sup> STREET**  
**MARION, IA 52302**  
FAX No.: 319-377-9252

**Linn-Mar Community School District  
Certification for Serious Injury or Illness of  
Covered Servicemember for Military  
Family Leave  
(Family and Medical Leave Act)**

**U.S. Department of Labor**  
Employment Standards Administration Wage and  
Hour Division



OMB Control Number: 1215-0181  
Expires: 12/31/2011

**Notice to the EMPLOYER**

**INSTRUCTIONS to the EMPLOYER:** The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA leave due to a serious injury or illness of a covered servicemember to submit a certification providing sufficient facts to support the request for leave. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. § 825.310. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees or employees' family members, created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

**SECTION I: For Completion by the EMPLOYEE and/or the COVERED SERVICEMEMBER for whom the Employee Is Requesting Leave**

**INSTRUCTIONS to the EMPLOYEE or COVERED SERVICEMEMBER:** Please complete Section I before having Section II completed. The FMLA permits an employer to require that an employee submit a timely, complete, and sufficient certification to support a request for FMLA leave due to a serious injury or illness of a covered servicemember. If requested by the employer, your response is required to obtain or retain the benefit of FMLA-protected leave. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to do so may result in a denial of an employee's FMLA request. 29 C.F.R. § 825.310(f). The employer must give an employee at least 15 calendar days to return this form to the employer.

**SECTION II: For Completion by a UNITED STATES DEPARTMENT OF DEFENSE ("DOD") HEALTH CARE PROVIDER or a HEALTH CARE PROVIDER who is either: (1) a United States Department of Veterans Affairs ("VA") health care provider; (2) a DOD TRICARE network authorized private health care provider; or (3) a DOD non-network TRICARE authorized private health care provider**

**INSTRUCTIONS to the HEALTH CARE PROVIDER:** The employee listed on Page 2 has requested leave under the FMLA to care for a family member who is a member of the Regular Armed Forces, the National Guard, or the Reserves who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list for a serious injury or illness. For purposes of FMLA leave, a serious injury or illness is one that was incurred in the line of duty on active duty that may render the servicemember medically unfit to perform the duties of his or her office, grade, rank, or rating.

A complete and sufficient certification to support a request for FMLA leave due to a covered servicemember's serious injury or illness includes written documentation confirming that the covered servicemember's injury or illness was incurred in the line of duty on active duty and that the covered servicemember is undergoing treatment for such injury or illness by a health care provider listed above. Answer, fully and completely, all applicable parts. Several questions seek a response as to the frequency or duration of a condition, treatment, etc. Your answer should be your best estimate based upon your medical knowledge, experience, and examination of the patient. Be as specific as you can; terms such as "lifetime," "unknown," or "indeterminate" may not be sufficient to determine FMLA coverage. Limit your responses to the condition for which the employee is seeking leave.

Linn-Mar Community School District  
Certification for Serious Injury or Illness of  
Covered Servicemember for Military  
Family Leave  
(Family and Medical Leave Act)

U.S. Department of Labor  
Employment Standards Administration Wage and  
Hour Division



**SECTION I: For Completion by the EMPLOYEE and/or the COVERED SERVICEMEMBER for whom the Employee Is Requesting Leave:** (This section must be completed first before any of the below sections can be completed by a health care provider.)

**Part A: EMPLOYEE INFORMATION**

Name and Address of Employer (this is the employer of the employee requesting leave to care for covered servicemember):

Linn-Mar Community School District 2999 North 10<sup>th</sup> Street Marion, IA 52302

Name of Employee Requesting Leave to Care for Covered Servicemember:

First Middle Last  
Name of Covered Servicemember (for whom employee is requesting leave to care):

First Middle Last

Relationship of Employee to Covered Servicemember Requesting Leave to Care:

☐ Spouse ☐ Parent ☐ Son ☐ Daughter ☐ Next of Kin

**Part B: COVERED SERVICEMEMBER INFORMATION**

(1) Is the Covered Servicemember a Current Member of the Regular Armed Forces, the National Guard or Reserves? ☐ No ☐ Yes

If yes, please provide the covered servicemember's military branch, rank and unit currently assigned to:

Is the covered servicemember assigned to a military medical treatment facility as an outpatient or to a unit established for the purpose of providing command and control of members of the Armed Forces receiving medical care as outpatients (such as a medical hold or warrior transition unit)? ☐ No ☐ Yes

If yes, please provide the name of the medical treatment facility or unit:

(2) Is the Covered Servicemember on the Temporary Disability Retired List (TDRL)? ☐ No ☐ Yes

**Part C: CARE TO BE PROVIDED TO THE COVERED SERVICEMEMBER**

Describe the Care to Be Provided to the Covered Servicemember and an Estimate of the Leave Needed to Provide the Care:

**SECTION II: For Completion by a United States Department of Defense (“DOD”) Health Care Provider or a Health Care Provider who is either: (1) a United States Department of Veterans Affairs (“VA”) health care provider; (2) a DOD TRICARE network authorized private health care provider; or (3) a DOD non-network TRICARE authorized private health care provider. If you are unable to make certain of the military-related determinations contained below in Part B, you are permitted to rely upon determinations from an authorized DOD representative (such as a DOD recovery care coordinator). (Please ensure that Section I above has been completed before completing this section.) Please be sure to sign the form on the last page.**

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual except as specifically allowed by this law. To comply with this law, we are asking that you not provide any genetic information when responding to this request for medical information. “Genetic Information” as defined by GINA includes an individual’s family medical history, the results of an individual’s or family members’ genetic tests, the fact that an individual or an individual’s family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual’s family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

**Part A: HEALTH CARE PROVIDER INFORMATION**

Health care provider’s name: \_\_\_\_\_

Provider’s business address: \_\_\_\_\_

Type of practice/Medical specialty: \_\_\_\_\_

Please state whether you are either: (1) a DOD health care provider; (2) a VA health care provider; (3) a DOD TRICARE network authorized private health care provider; or (4) a DOD non-network TRICARE authorized private health care provider: \_\_\_\_\_

Telephone: (     ) \_\_\_\_\_ Fax: (     ) \_\_\_\_\_ Email: \_\_\_\_\_

**PART B: MEDICAL STATUS**

(1) Covered Servicemember’s medical condition is classified as (Check One of the Appropriate Boxes):

- ☐ **(VSI) Very Seriously Ill/Injured** – Illness/Injury is of such a severity that life is imminently endangered. Family members are requested at bedside immediately. (Please note this is an internal DOD casualty assistance designation used by DOD healthcare providers.)
- ☐ **(SI) Seriously Ill/Injured** – Illness/injury is of such severity that there is cause for immediate concern, but there is no imminent danger to life. Family members are requested at bedside. (Please note this is an internal DOD casualty assistance designation used by DOD healthcare providers.)
- ☐ **OTHER Ill/Injured** – a serious injury or illness that may render the servicemember medically unfit to perform the duties of the member’s office, grade, rank, or rating.
- ☐ **NONE OF THE ABOVE** (Note to Employee: If this box is checked, you may still be eligible to take leave to care for a covered family member with a “serious health condition” under § 825.113 of the FMLA. If such leave is requested, you may be required to complete DOL FORM WH-380 or an employer-provided form seeking the same information.)

(2) Was the condition for which the Covered Service member is being treated incurred in line of duty on active duty in the armed forces? \_\_\_ No \_\_\_ Yes

(3) Approximate date condition commenced: \_\_\_\_\_

(4) Probable duration of condition and/or need for care: \_\_\_\_\_

(5) Is the covered servicemember undergoing medical treatment, recuperation, or therapy? \_\_\_\_ No \_\_\_\_ Yes  
If yes, please describe medical treatment, recuperation or therapy:

\_\_\_\_\_  
\_\_\_\_\_

**PART C: COVERED SERVICEMEMBER'S NEED FOR CARE BY FAMILY MEMBER**

(1) Will the covered servicemember need care for a single continuous period of time, including any time for treatment and recovery? \_\_\_\_ No \_\_\_\_ Yes

If yes, estimate the beginning and ending dates for this period of time: \_\_\_\_\_

(2) Will the covered servicemember require periodic follow-up treatment appointments? \_\_\_\_ No \_\_\_\_ Yes

If yes, estimate the treatment schedule: \_\_\_\_\_

(3) Is there a medical necessity for the covered servicemember to have periodic care for these follow-up treatment appointments? \_\_\_\_ No \_\_\_\_ Yes

(4) Is there a medical necessity for the covered servicemember to have periodic care for other than scheduled follow-up treatment appointments (e.g., episodic flare-ups of medical condition)? \_\_\_\_ No \_\_\_\_ Yes

If yes, please estimate the frequency and duration of the periodic care:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature of Health Care Provider

\_\_\_\_\_  
Date

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# Linn-Mar Community School District Medical Documentation of Absence



It is the practice of the Linn-Mar Community School District to require a fitness-for-duty certificate from their physician if an employee has been absent for one calendar week or more due to the employee's personal injury or illness, prior to reporting back to work.

- ☐ Please see the attached job description to determine return to full duties or restrictions as necessary.

\_\_\_\_\_ (Employee Name) **may return to full duties without restrictions** on \_\_\_\_\_ (Date).

**OR**

Due to illness/injury on \_\_\_\_\_ (Date) this employee is not capable of performing the essential functions of his/her job.

Please indicate any restrictions below and the duration of the restrictions.

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Comments:

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Anticipated date employee can return to full unrestricted duty: \_\_\_\_\_

\_\_\_\_\_  
(Date)                      (Physician's Name printed)                      (Physician's signature)

Business address:

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Business phone:

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**Return to:**

Office of Human Resources  
Linn-Mar Community School District  
2999 North 10<sup>th</sup> Street  
Marion, IA 52302

Phone: (319) 447-3004

Fax: (319) 377-9252

**EMPLOYEE RIGHTS AND RESPONSIBILITIES  
UNDER THE FAMILY AND MEDICAL LEAVE ACT**

**Basic Leave Entitlement**

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected

leave to eligible employees for the following reasons:

- For incapacity due to pregnancy, prenatal medical care or child birth;
- ☐ To care for the employee's child after birth, or placement for adoption or foster care;
- To care for the employee's spouse, son or daughter, or parent, who has a serious health condition; or
- ☐ For a serious health condition that makes the employee unable to perform the employee's job.

**Military Family Leave Entitlements**

Eligible employees with a spouse, son, daughter, or parent on active duty or call to active duty status in the National Guard or Reserves in support of a contingency operation may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered servicemember during a single 12-month period. A covered servicemember is a current member of the Armed Forces, including a member of the National Guard or Reserves, who has a serious injury or illness incurred in the line of duty on active duty that may render the servicemember medically unfit to perform his or her duties for which the servicemember is undergoing medical treatment, recuperation, or therapy; or is in outpatient status; or is on the temporary disability retired list.

**Benefits and Protections**

During FMLA leave, the employer must maintain the employee's health coverage under any "group health plan" on the same terms as if the employee had continued to work. Upon return from FMLA leave, most employees must be restored to their original or equivalent positions with equivalent pay, benefits, and other employment terms.

Use of FMLA leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee's leave.

**Eligibility Requirements**

Employees are eligible if they have worked for a covered employer for at least one year, for 1,250 hours over the previous 12 months, and if at least 50 employees are employed by the employer within 75 miles.

**Definition of Serious Health Condition**

A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job, or prevents the qualified family member from participating in school or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

**Use of Leave**

An employee does not need to use this leave entitlement in one block. Leave can be taken intermittently or on a reduced leave schedule when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the employer's operations. Leave due to qualifying exigencies may also be taken on an intermittent basis.

**Substitution of Paid Leave for Unpaid Leave**

Employees may choose or employers may require use of accrued paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, employees must comply with the employer's normal paid leave policies.

**Employee Responsibilities**

Employees must provide 30 days advance notice of the need to take FMLA leave when the need is foreseeable. When 30 days notice is not possible, the employee must provide notice as soon as practicable and generally must comply with an employer's normal call-in procedures.

Employees must provide sufficient information for the employer to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for military family leave. Employees also must inform the employer if the requested leave is for a reason for which FMLA leave was previously taken or certified. Employees also may be required to provide a certification and periodic recertification supporting the need for leave.

**Employer Responsibilities**

Covered employers must inform employees requesting leave whether they are eligible under FMLA. If they are, the notice must specify any additional information required as well as the employees' rights and responsibilities. If they are not eligible, the employer must provide a reason for the ineligibility.

Covered employers must inform employees if leave will be designated as FMLA protected and the amount of leave counted against the employee's leave entitlement. If the employer determines that the leave is not FMLA-protected, the employer must notify the employee.

**Unlawful Acts by Employers**

FMLA makes it unlawful for any employer to:

- Interfere with, restrain, or deny the exercise of any right provided under FMLA;
- Discharge or discriminate against any person for opposing any practice made unlawful by FMLA or for involvement in any proceeding under or relating to FMLA.

**Enforcement**

An employee may file a complaint with the U.S. Department of Labor or may bring a private lawsuit against an employer.

FMLA does not affect any Federal or State law prohibiting discrimination, or supersede any State or local law or collective bargaining agreement which provides greater family or medical leave rights.

**FMLA section 109 (29 U.S.C. § 2619) requires FMLA covered employers to post the text of this notice. Regulations 29 C.F.R. § 825.300(a) may require additional disclosures.**

**For additional information:**

1-866-4US-WAGE (1-866-487-9243) TTY: 1-877-889-5627  
www.wagehour.dol.gov



PERSONNEL

Policy Title PROFESSIONAL ORGANIZATIONS Code 403.8

Individual members of the staff are encouraged to participate in organizations that promote specific disciplines in their related field.

Adopted 6/15/70 Reviewed 1/06; 2/09; 2/10; 12/11; 4/13; 9/8/14 Revised 5/97; 5/21/01  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title PARTICIPATION IN COMMUNITY ACTIVITIES

Code 403.9

The Board believes that participation by district personnel in community activities is worthwhile and desirable.

It shall be the policy of the Board to support voluntary participation of staff members who wish to affiliate with organizations or to participate in community activities deemed acceptable to the individual staff member. Freedom of choice shall be the prerogative of the staff member, but it is assumed that participation in any activity will be in keeping with the overall goals and objectives of the district's educational program.

Adopted 6/15/70 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/97; 1/16/06

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



PERSONNEL

Policy Title RELIGIOUS OBSERVANCE

Code 403.10

Any personnel whose religious affiliation requires the observance of holidays other than those scheduled in the school calendar may be excused by the Superintendent of Schools or designee without loss of salary.

Adopted 6/15/70 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 5/97; 3/06; 2/15/10

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title HAZARDOUS CHEMICAL DISCLOSURE Code 403.11

The Board authorizes the development of a comprehensive hazardous chemical communication program for the school district to disseminate information about hazardous chemicals in the workplace.

It shall be the responsibility of the superintendent, or designee, to develop administrative regulations regarding this program.

In order to maintain a safe and healthful work environment the Linn-Mar Community School District maintains a Hazardous Chemical Communication Program that complies with all state and federal regulations. By making employee safety a high priority for every employee, injuries and illness can be reduced, productivity can be increased and a safer and healthier environment can be promoted for all individuals at Linn-Mar Community School District.

All containers of hazardous materials used by employees and contractors must be labeled, tagged or marked with appropriate hazard warning and appropriate training must be provided to all employees and contractors working on the premises. All manufacturers, importers, suppliers and/or distributors of hazardous materials shall supply Linn-Mar Community School District with material safety data sheets (MSDS) as a part of the purchase process. Linn-Mar Community School District employees who purchase hazardous chemicals will ensure that copies of MSDS for these chemicals are provided for their building and a copy will be sent to the Operations and Maintenance MSDS Coordinator, who will maintain a central file. Each school building will have at least two MSDS binders, one to be maintained in a custodial area and another to be located in the building office. Other buildings where hazardous chemicals are in use will maintain a MSDS binder in a central office area.

Contractors working on-site are required to provide MSDS for all hazardous materials brought on site and must remove all unused materials and empty container from the company premises.

Any Linn-Mar Community School District employee ordering/purchasing a hazardous chemical should verify that all containers received for use will identify:

- Types and identification of hazardous waste.
- Characteristics of hazardous waste.
- Determination of hazardous waste.
- Hazardous waste accumulation and disposal information.
- Hazardous waste and emergency response information.

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Adopted 8/14/89 Reviewed 1/06; 12/11; 4/13 Revised 5/01; 2/09; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code chs. 88, 89B, 29 CFR 1910; 1200 et seq.; 547 IAC 110, 530 IAC 130, 37 I.A.C. 120

PERSONNEL

Policy Title HAZARDOUS CHEMICAL DISCLOSURE Code 403.11

A review training session will be given annually. Additional training and instruction will be provided whenever chemicals or processes change or newly acquired information indicates the need for education or protective measures.

Supervisors shall ensure that employees under their supervision receive initial and annual training as required by this plan. Training may consist of on-line programs, classroom-style presentations or a combination of both. Training records shall be maintained by the Human Resources Department.

School District personnel who will be instructing or otherwise working with students shall disseminate information about the hazardous chemicals they will be working with as part of the instructional program. School District personnel are required to disseminate the information when the materials are used in the instructional program.

School district personnel who will be instructing or otherwise working with students shall disseminate information about the hazardous chemicals they will be working with as part of the instructional program. School district personnel are required to disseminate the information when the materials are used in the instructional program.

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Adopted 8/14/89 Reviewed 1/06; 12/11; 4/13 Revised 5/01; 2/09; 2/10; 3/11; 9/8/14  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) Iowa Code chs. 88, 89B, 29 CFR 1910; 1200 et seq.; 547 IAC 110, 530 IAC 130, 37 I.A.C. 120



## PERSONNEL

Policy Title COMMUNICABLE DISEASES WHICH ARE REPORTABLE Code 403.12

School district personnel with a communicable disease that is reportable will be allowed to perform their customary employment duties as long as they are able to perform the tasks assigned to them and as long as their presence does not create a substantial risk of illness transmission to the students or other personnel. The term "reportable disease" shall mean an infectious or contagious disease spread from person to person or animal to person or as defined by the State Department of Health.

The health risk to immuno-depressed school district personnel shall be determined by their personal physician. The health risk to others in the school environment from the presence of employees with a reportable disease shall be determined on a case by case basis by public health officials.

Since there may be greater risks of transmission of a reportable disease for some persons with certain conditions than for other persons infected with the same disease, the effect upon the educational program, the effect upon the person and other factors deemed relevant by public health officials or the superintendent shall be considered in assessing school district personnel's continued presence and performance of their employment responsibilities. The superintendent or designee may require medical evidence that school district personnel with a reportable disease are able to perform their assigned duties.

A school district employee shall notify the superintendent, designee or the school nurse when the employee learns the employee has a reportable disease. It shall be the responsibility of the superintendent or designee when he/she has knowledge that a reportable disease is present, to notify the State Department of Health. Rumor and hearsay shall be insufficient evidence for the superintendent to act.

Health data of an employee is confidential and it shall not be disseminated. Employee medical records are kept in a file separate from their personnel file.

It shall be the responsibility of the superintendent, or designee, in conjunction with the school nurse, to develop administrative regulations stating the procedures for dealing with the school district personnel with a reportable disease.

Adopted 6/12/89 Reviewed 1/06; 2/09; 1/11; 12/11; 4/13 Revised 5/97; 5/01; 2/10; 9/8/14

Related Policy: (Code Number) 504.2-R

Legal Reference: (Code of Iowa) School Board of Nassau Co. vs. Arlin, 480 U.S. 273; 29 U.S.C. 794, -1910; §§ 79-910; 42 U.S.C. §§ 12101 et.Seq.; 45 C.F.R. Pt. 84.3; Iowa Code chs. 139A; 141A; 641 I.A.C. 1.2-.7





## PERSONNEL

Policy Title HARASSMENT/WORKPLACE BULLYING Code 403.13

- A. **Policy:** All members of the Linn-Mar Community School District including, but not necessarily limited to, the Board, the Administration, the faculty, the staff, and the students, are expected to conduct themselves at all times so as to provide an atmosphere free from acts of intolerance, bullying or harassment toward employees or students because of age, race, creed, gender, marital status, national origin, religion, sexual orientation, disability, ethnicity, gender identity, genetic information, physical appearance or any other basis protected by federal, state or local law. Such acts may be treated as just cause for purposes of discipline or discharge.
- B. **Definitions:** Physical, verbal, non-verbal, and/or written or electronic acts of intolerance, bullying or harassment are unwelcome actions or language which are of a prejudicial or discriminatory nature or with demeaning intent related to age, race, creed, gender, marital status, national origin, religion, sexual orientation, disability, ethnicity, gender identity, genetic information or physical appearance that places an employee in reasonable fear of harm to the employee or their property, has a detrimental effect on the employee's physical or mental health or has the effect of substantially interfering with the employee's work performance or creation of an intimidating, offensive or hostile environment. The use of racial, ethnic, sexual/sexist slurs or slurs related to a disability or any of the other areas protected by this policy are clearly demeaning.
- C. Examples of Harassment/Workplace bullying include but are not limited to:
- Verbal:
- Jokes that demean others
  - Name calling/inappropriate nicknames
  - Negative comments
  - Slander (toward a person or his/her family)
  - Shouting or raising voice at an individual with the exception of an emergency
  - Obscene verbal comments
  - Personal insults
- Non-Verbal:
- Threatening gestures
  - Glances which can convey threatening messages
  - Written (including email) material that is harmful, malicious, threatening and/or slanderous
  - Refusal to communicate or speak to individuals

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Adopted 8/14/89 Reviewed 1/06; 12/11; 4/13; 2/14 Revised 5/01; 2/09; 2/10; 3/11; 9/8/14  
Related Policy: (Code Number) 103, 403.14, 502.14  
Legal Reference: (Code of Iowa) 280.3; 20 U.S.C. 1221-1234i; 29 U.S.C. 794; 42 U.S.C. 2000d-2000d7; 42 U.S.C. 12101; Iowa Code 216.9; 280.28, 280.3; 281 I.A.C. 12.3(6); Morse v. Frederick, 127 S.Ct. 2618

## PERSONNEL

Policy Title HARASSMENT/WORKPLACE BULLYING Code 403.13

Physical:

- Pushing, shoving, kicking, poking or tripping
- Assault, or threat of physical assault

Exclusion:

- Socially or physically excluding or disregarding a person in work-related activities
- Persistent singling out of one person

Other:

- Sabotaging another's work (ex., taking credit for another individual's work, blaming other individuals for mistakes they did not make, etc.)
- Not allowing a person to speak or express him/herself (ex., ignoring or excessively interrupting)
- Public humiliation
- Deliberately interfering with mail and other communications
- Spreading rumors and gossip regarding individuals
- Manipulating the ability of someone to do their work (withholding information, etc.)
- Taking credit for another person's ideas
- Publicly disclosing another's private information

- D. **Notification:** Members of the school community shall be given notice of this policy annually.
- E. **Complaint Procedures:** Persons who feel they are victims of acts of intolerance, bullying or harassment or persons who feel they are aware of acts of intolerance, bullying or harassment should take action by reporting said acts to or filing a complaint with the Executive Director of Human Resources or the Equity Coordinator, who will determine if an investigation is warranted. The investigator may request that the individual complete a written Harassment/Workplace Bullying complaint form and submit other evidence of the harassment/bullying including but not limited to, letters, electronic documents or pictures. If substantiated the District will conduct a timely investigation in as confidential a manner as possible and allowed by law. Interviews, allegations, statements and identities will be kept confidential to the extent possible and allowed by law. However, the District will not allow the goal of confidentiality to be a deterrent to an effective investigation and all employees who are involved in an investigation are expected to provide honest and complete cooperation. Appropriate corrective action, up to and including termination, will be taken promptly against any employee engaging in acts of intolerance, bullying or harassment and/or employees who are found to be dishonest or uncooperative during an investigation. The corrective action issued will be proportional to the severity of the conduct.

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Adopted 8/14/89 Reviewed 1/06; 12/11; 4/13; 2/14 Revised 5/01; 2/09; 2/10; 3/11; 9/8/14

Related Policy: (Code Number) 103, 403.14, 502.14

Legal Reference: (Code of Iowa) 280.3; 20 U.S.C. 1221-1234i; 29 U.S.C. 794; 42 U.S.C. 2000d-2000d7; 42 U.S.C. 12101; Iowa Code 216.9; 280.28, 280.3; 281 I.A.C. 12.3(6); Morse v. Frederick, 127 S.Ct. 2618

## PERSONNEL

Policy Title HARASSMENT/WORKPLACE BULLYING Code 403.13

The District prohibits retaliation of any kind against employees, who, in good faith, report bona fide acts of intolerance, bullying or harassment, assist with or conduct an investigation regarding such complaints or appear as a witness. If an employee feels he/she has been subjected to any form of retaliation, the employee should report that conduct to his/her immediate supervisor, the Executive Director of Human Resources or the Equity Coordinator within three calendar days of the offense. Employees are not required to approach the person who is retaliating against them, and they may bypass any offending member of management.

Retaliation or attempted retaliation is a violation of this policy and anyone who does so will be subject to severe discipline up to and including termination.

Inquiries and grievances should be filed with: Linn-Mar Equity Coordinators, Executive Director of Human Resources Karla Christian or Deputy Superintendent Officer Dirk Halupnik at 2999 North Tenth Street, Marion, Iowa 52302, or 319-447-3036 / 319-447-3028, who have been designated by the school district to coordinate the school district's efforts to comply with the regulations implementing Title VI, title VII, Title IX, the ADA, § 504, and Iowa Code § 280.3 (2007).

Inquiries may also be directed, in writing, to the Iowa Civil Rights Commission, 400 E. 14<sup>th</sup> Street, Des Moines, IA, 50319, (800) 457-4416, the Director of the Region VII Office of the United States Equal Employment Opportunity Commission, 601 East 12<sup>th</sup> Street – Room 353, Kansas City, MO, 64106, or the U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Bldg., 400 Maryland Avenue, SW, Washington, DC, 20202-1100, (800) 421-3481.

See: Complaint Form – 104-E1; Witness Disclosure Form – 104-E2

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Adopted 8/14/89 Reviewed 1/06; 12/11; 4/13; 2/14 Revised 5/01; 2/09; 2/10; 3/11; 9/8/14  
Related Policy: (Code Number) 103, 403.14, 502.14  
Legal Reference: (Code of Iowa) 280.3; 20 U.S.C. 1221-1234i; 29 U.S.C. 794; 42 U.S.C. 2000d-2000d7; 42 U.S.C. 12101; Iowa Code 216.9; 280.28, 280.3; 281 I.A.C. 12.3(6); Morse v. Frederick, 127 S.Ct. 2618



## PERSONNEL

Policy Title SEXUAL HARASSMENT Code 403.14

- A. **Policy:** All members of the Linn-Mar Community School District including, but not necessarily limited to, the Board, the Administration, the faculty, the staff, and the students, are expected to conduct themselves at all times so as to provide an atmosphere free from sexual harassment. Any person who is proven to engage in sexual harassment while acting as a member of the school community will be in violation of this policy and will be subject to discipline or discharge.
- B. **Definition of Sexual Harassment:** Unwelcome sexual advances; requests for sexual favors; or verbal, non-verbal or physical conduct of a sexual nature may constitute sexual harassment where:
1. Submission to such conduct is made either explicitly or implicitly a term or condition of a person's employment or educational development; or,
  2. Submission to or rejection of such conduct by an individual is used as the basis for employment or educational decisions affecting such individual; or,
  3. Such conduct has the purpose or effect of unreasonably interfering with an individual's work or educational performance or creating an intimidating, hostile, or offensive working or educational environment.
- C. **Notification:** Members of the school community shall be given notice of this policy annually.
- D. **Complaint Procedures:** Persons who feel they are victims of sexual harassment or persons who feel they are aware of acts of sexual harassment should take action by reporting said acts to or filing a complaint with the Executive Director of Human Resources or the Equity Coordinator, who will determine if an investigation is warranted. The investigator may request that the individual complete a written Sexual Harassment complaint form and submit other evidence of the sexual harassment including but not limited to, letters, electronic documents or pictures. If substantiated, the District will conduct a timely investigation in as confidential a manner as possible and allowed by law. Interviews, allegations, statements and identities will be kept confidential to the extent possible and allowed by law. However, the District will not allow the goal of confidentiality to be a deterrent to an effective investigation and all employees who are involved in an investigation are expected to provide honest and complete cooperation. Appropriate corrective action, up to and including termination, will be taken promptly against any employee engaging in acts of sexual harassment and/or employees who are

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Adopted 6/13/85 Reviewed 1/11; 12/11; 4/13; 2/14; 9/8/14 Revised 3/06; 8/07; 2/09; 2/15/10  
Related Policy: (Code Number) 103, 403.13, 502.14  
Legal Reference: (Code of Iowa) Section 703 of Title VII of the Civil Rights Act of  
1964 as amended; Iowa Code 280.3 (2007)

## PERSONNEL

Policy Title SEXUAL HARASSMENT Code 403.14

found to be dishonest or uncooperative during an investigation. The corrective action issued will be proportional to the severity of the conduct

The District prohibits retaliation of any kind against employees, who, in good faith, report bona fide acts of sexual harassment, assist with or conduct an investigation regarding such complaints or appear as a witness. If an employee feels he/she has been subjected to any form of retaliation, the employee should report that conduct to his/her immediate supervisor, the Executive Director of Human Resources or the Equity Coordinator within three calendar days of the offense. Employees are not required to approach the person who is retaliating against them, and they may bypass any offending member of management.

Retaliation or attempted retaliation is a violation of this policy and anyone who does so will be subject to severe discipline up to and including termination.

Inquiries and grievances should be filed with: Linn-Mar Equity Coordinators, Executive Director of Human Resources Karla Christian or Deputy Superintendent Officer Dirk Halupnik at 2999 North Tenth Street, Marion, Iowa 52302, or 319-447-3036 / 319-447-3028, who have been designated by the school district to coordinate the school district's efforts to comply with the regulations implementing Title VI, Title VII, Title IX, the ADA, § 504, and Iowa Code § 280.3 (2007).

Inquiries may also be directed, in writing, to the Iowa Civil Rights Commission, 400 E. 14<sup>th</sup> Street, Des Moines, IA, 50319, (800) 457-4416, the Director of the Region VII Office of the United States Equal Employment Opportunity Commission, 601 East 12<sup>th</sup> Street – Room 353, Kansas City, MO, 64106, (800) 368-1019, or the U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Bldg., 400 Maryland Avenue, SW, Washington, DC, 20202-1100, (800) 421-3481.

See: Complaint Form – 104-E1; Witness Disclosure Form – 104-E2

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Adopted 6/13/85 Reviewed 1/11; 12/11; 4/13; 2/14; 9/8/14 Revised 3/06; 8/07; 2/09; 2/15/10

Related Policy: (Code Number) 103, 403.13, 502.14

Legal Reference: (Code of Iowa) Section 703 of Title VII of the Civil Rights Act of  
1964 as amended; 280.3 (2007)



## PERSONNEL

### PROCEDURES FOR CHARGING AND INVESTIGATING ALLEGATIONS

Policy Title OF ABUSE OF STUDENTS BY SCHOOL EMPLOYEES Code 403.15

Linn-Mar School employees will not commit acts of physical or sexual abuse, including inappropriate and intentional sexual behavior toward students. Disciplinary actions, up to and including discharge, will be taken against any school employee who commits such acts.

Prompt investigative action will be taken in response to allegations of abuse of students by school employees. Any complaint or allegation will be handled with as much confidentiality as possible. When requested, all employees will assist in the investigation to provide information and keep confidentiality of the report and investigation.

The Linn-Mar Community School District shall appoint a Level I investigator and alternate, and shall arrange for or contract with a trained, experienced professional to serve as the Level II investigator. The Level I investigator and alternate shall be provided training in the conducting of an investigation, at the expense of the Linn-Mar Community School District.

This policy shall be carried out in accordance with state law.

#### Linn-Mar Level I Investigators:

Deputy Superintendent Dirk Halupnik – 319-447-3028

Executive Director of Human Resources Karla Christian – 319-447-3036

Executive Director of Student Services Julie Jensen – 319-447-3003

Linn-Mar Community School District  
2999 North Tenth Street  
Marion, IA 52302

Adopted 5/7/90 Reviewed 2/09; 3/11; 12/11; 4/13 Revised 5/97; 3/06; 2/10; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code §§ 232.67, .70, .73, .75; 235A; 280.17; 709; 728.12(1); 281 I.A.C.; 12.3(6); 102; 103; 441 I.A.C.; 155; 175; 1980 Op.

Att’y Gen 275; 272A



LINN-MAR COMMUNITY SCHOOL DISTRICT  
**Abuse of Student by School District Employee Report Form**  
Complaint of Injury to or Abuse of a Student by a School District Employee

Please complete the following as fully as possible. If you need assistance, contact the Level I investigator in your school.

Student's name and address: \_\_\_\_\_

\_\_\_\_\_

Student's telephone number: \_\_\_\_\_

Student's school: \_\_\_\_\_

Name and place of employment of employee accused of abusing student: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Allegation is of \_\_\_\_\_ physical \_\_\_\_\_ sexual abuse\*

Please describe what happened. Include the date, time, and where the incident took place, if known.

If physical abuse is alleged, also state the nature of the student's injury: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Were there any witnesses to the incident or are there students or persons who may have information about this incident? \_\_\_\_\_ yes \_\_\_\_\_ no

If yes, please list by name, if known, or classification (for example: "third grade class," fourth period geometry class"): \_\_\_\_\_

\_\_\_\_\_

\*Parents of children who are in pre-kindergarten through sixth grade and whose children are the alleged victims of or witnesses to sexual abuse have the right to see and hear any interviews of their children in this investigation. Please indicate "yes" if the parent/guardian wishes to exercise this right:

\_\_\_\_\_ yes \_\_\_\_\_ no Telephone number \_\_\_\_\_



## PERSONNEL

Policy Title EMPLOYEE RECORDS Code 403.16

The school district shall maintain personnel records on employees. The records are important for the daily administration of the educational program, for implementing board policy, for budget and financial planning, and for meeting state and federal requirements.

The records shall include, but not be limited to, records necessary for the daily administration of the school district, salary records, evaluations, application for employment, references, and other items needed to carry out board policy. Employee personnel files are school district records and are considered confidential records and therefore are not generally open to public inspection or accessibility. Only in certain limited instances, when the employee has given a signed consent, will employee personnel records be accessible to individuals other than the employee or authorized school officials. Board members will only have access to an employees' file when it is necessary because of an employee-related matter before the Board. Personnel files are to be reviewed in the Human Resources Department. Personnel files may not be taken outside of the department.

Employees may have access to their personnel file and copy items from their personnel file. All requests for access to personnel files must be provided in writing to Human Resources. Upon receipt of a written request, Human Resources will schedule an appointment during normal office hours at a time mutually agreed upon between Human Resources and the employee. The school district may charge a reasonable fee for each copy made except the total amount charged for all copies cannot exceed \$5.00. Personnel files will not include any reference checks, medical records or investigation files. Employees are unable to remove any documents from the personnel file but may provide a written response to any document in the personnel file. Written responses will be attached to the original document in the personnel file.

It shall be the responsibility of the superintendent, or designee, to keep employees' personnel files current. Human Resources shall be the custodian of employee records.

It shall be the responsibility of the superintendent to develop administrative regulations for implementation of this policy.

Adopted 5/5/97 Reviewed 2/09; 1/11; 12/11; 4/13; 9/8/14 Revised 3/06; 2/15/10  
Related Policy: (Code Number) 805.6  
Legal Reference: (Code of Iowa) Iowa Code chs. §§20; 21; 22; 91B





## ADMINISTRATIVE REGULATIONS REGARDING EMPLOYEE RECORDS

### Employee Personnel Records Content

1. Employee personnel records may contain the following information:
  - Personal information including, but not limited to, name, address, telephone number, emergency numbers, birth date and spouse
  - Individual employment contract
  - Evaluations
  - Application, resume and references
  - Salary information
  - Copy of the employee's license or certificate, if needed for the position
  - Educational transcripts
  - Assignment
  - Records of disciplinary matters
2. Employee health and medical records shall be kept in a file separate from the employee's personnel records. Health and medical records may contain, but are not limited to:
  - Medical professional signed physical form
  - Sick or long-term disability leave days
  - Worker's compensation claims
  - Reasonable accommodations made by the school district to accommodate the employee's disability
  - Employee's medical history
  - Employee's emergency names and numbers
  - Family and medical leave request forms

### Applicant File Records Content

Records on applicants for positions with the school district shall be maintained in the central administration office. The records shall include, but not be limited to:

- Application for employment
- Resume
- References
- Evidence of appropriate license or certificate, if necessary for the position for which the individual applied
- Affirmative action form, if submitted

## ADMINISTRATIVE REGULATIONS REGARDING EMPLOYEE RECORDS

### Record Access

Only authorized school officials shall have access to an employee's records without the written consent of the employee. Authorized school officials may include, but not be limited to, the superintendent, building principal, or Board secretary. In the case of a medical emergency, the school nurse or other first aid or safety personnel may have access to the employee's health or medical file without the consent of the employee. Board members will generally only have access to an employee's personnel file without the consent of the employee when necessary for the conducting of Board business.

### Employee Record Retention

All employee records, except payroll and salary records, shall be maintained for a minimum of seven years after termination of employment with the district. Applicant records shall be maintained for a minimum of seven years after the position was filled. Payroll and salary records shall be maintained for a minimum of three years after payment.



## PERSONNEL

Policy Title EMPLOYEE CONFLICT OF INTEREST Code 403.17

Employees are expected to use good judgment, adhere to high ethical standards and avoid situations that create an actual or perceived conflict between their personal interests and those of the District. Employee's use of their position with the Linn-Mar Community School District for financial gain shall be considered a conflict of interest with their position as employees and may be subject to disciplinary action.

Employees have access to information and a captive audience that could award that employee personal or financial gain. No employee may solicit other employees or students for personal or financial gain to the employee without the approval of the superintendent. If the approval of the superintendent is given, the employee must conduct the solicitations within the conditions set by the superintendent. Further, the superintendent may, upon five days notice, require the employee to cease such solicitations as a condition of continued employment.

Employees shall not act as an agent or dealer for the sale of textbooks or other school supplies. Employees shall not participate for personal financial remuneration in outside activities wherein their position on the staff is used to sell goods or services to students or to parents. Employees shall not engage in outside work or activities where the source of information concerning the customer, client, or employer originates from information obtained because of the employee's position in the school district.

It shall also be a conflict of interest for an employee to engage in any outside employment or activity which is in conflict with the employee's official duties and responsibilities. In determining whether outside employment or activity of an employee creates a conflict of interest, situations in which an unacceptable conflict of interest shall be deemed to exist shall include, but not be limited to, any of the following:

1. The outside employment or activity involves the use of the school district's time, facilities, equipment, and supplies or the use of the school district's badge, uniform, business card, or other evidences of office to give the employee or the employee's immediate family an advantage or pecuniary benefit that is not available to other similarly situated members or classes of members of the general public. For purposes of this section, a person is not "similarly situated" merely by being related to an employee who is employed by the school district.

## PERSONNEL

Policy Title EMPLOYEE CONFLICT OF INTEREST Code 403.17

2. The outside employment or activity involves the receipt of, promise of, or acceptance of more or other consideration by the employee or a member of the employee's immediate family from anyone other than the school district for the performance of any act that the employee would be required or expected to perform as part of the employee's regular duties or during the hours during which the employee performs service or work for the school district.
3. The outside employment or activity is subject to the official control, inspection, review, audit, or enforcement authority of the employee during the performance of the employee's duties.

If the outside employment or activity is employment or activity in No. 1 or No. 2 above, the employee must cease the employment or activity. If the activity or employment falls under No. 3, then the employee must:

- Cease the outside employment or activity; or
- Publicly disclose the existence of the conflict and refrain from taking any official action or performing any official duty that would detrimentally affect or create a benefit for the outside employment or activity. Official action or official duty includes, but is not limited to, participating in any vote, taking affirmative action to influence any vote, or providing any other official service or thing that is not available generally to members of the public in order to further the interests of the outside employment or activity.

It shall be the responsibility of each employee to be aware of and take the necessary action to eliminate a potential conflict of interest should it arise.

Employees are encouraged to seek assistance from their administrator or supervisor with any ethical concerns. However, the District recognizes this may not always be possible. Therefore, employees may contact Human Resources or superintendent to report anything they cannot discuss with their administrator or supervisor.

Complaint Procedures: Employees or third parties who believe they have knowledge of any violation of this policy shall immediately file a complaint with their immediate supervisor or Executive Director of Human Resources who will determine if an investigation is warranted. The investigator may request that the individual complete a signed, written complaint form and submit other evidence of the unethical act including but not limited to, letters, electronic documents or pictures. If substantiated, the District will conduct a timely investigation in as confidential a

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Adopted 5/5/97 Reviewed 1/06; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 2/2/09  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) §§ 20.7; 68B; 279.8; 301.28 (1995)

PERSONNEL

Policy Title EMPLOYEE CONFLICT OF INTEREST Code 403.17

manner as possible. Interviews, allegations, statements and identities will be kept confidential to the extent possible and allowed by law. However, the District will not allow the goal of confidentiality to be a deterrent to an effective investigation and all employees who are involved in an investigation are expected to provide honest and complete cooperation. Appropriate disciplinary action, up to and including termination, will be taken promptly against any employee engaging in unethical acts and/or employees who are found to be dishonest or uncooperative during an investigation. The corrective action issued will be proportional to the severity of the conduct.

Adopted 5/5/97 Reviewed 1/06; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 2/2/09  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) §§ 20.7; 68B; 279.8; 301.28 (1995)



## PERSONNEL

Policy Title PUBLIC COMPLAINTS ABOUT EMPLOYEES Code 403.18

From time to time the public may have complaints regarding the behavior of employees. The Board recognizes that situations may arise in the operation of the school district which are of concern to parents and other members of the school district community. While constructive criticism is welcomed, the Board desires to support its employees and their actions to free them from unnecessary, spiteful, or negative criticism and complaints that do not offer advice for improvement or change.

The Board firmly believes concerns should be resolved at the lowest organizational level by those individuals closest to the concern. Whenever a complaint or concern is brought to the attention of the Board, it will be referred to the administration to be resolved. Prior to board action however, the following should be completed:

- (a) Matters concerning an individual student, teacher, or other employee should first be addressed to the teacher or employee.
- (b) Unsettled matters from (a) above or problems and questions about individual attendance centers should be addressed to the employee's building principal or classified director.
- (c) Unsettled matters regarding licensed employees from (b) above or problems and questions concerning the school district should be directed to the superintendent.
- (d) If a matter cannot be settled satisfactorily by the superintendent, it may then be brought to the Board. To bring a concern regarding an employee, the individual may notify the board president in writing, who may bring it to the attention of the entire Board, or the item may be placed on the board agenda of a regularly scheduled board meeting in accordance with board policy.

It is within the discretion of the Board to address complaints from the members of the school district community, and the Board will only do so if they are in writing, signed, and the complainant has complied with this policy.

Adopted 5/5/97 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 1/16/06  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) § 279.8 (1995)



## PERSONNEL

Policy Title DRUG AND ALCOHOL TESTING PROGRAM

Code 403.19

Employees who operate school vehicles classified as “commercial motor vehicles” by the U.S. Department of Transportation, and are required to possess a commercial driver’s license (CDL) to operate those vehicles, are subject to drug and alcohol testing. A “commercial motor vehicle” is a vehicle that transports sixteen or more persons including the driver or has a gross vehicle weight rating (GVWR) of 26,001 pounds or more. For purposes of the drug and alcohol testing program, the term “employees” includes applicants who have been offered a position to operate a commercial motor vehicle owned by the school.

Employees or employee applicants that will operate a school vehicle as described above are subject to pre-employment drug testing prior to being allowed to perform a safety sensitive function using the school vehicle. In addition, employees will be subject to random, reasonable suspicion and post-accident drug and alcohol testing. Employees operating school vehicles will not perform a safety-sensitive function within four hours of using alcohol. Employees governed by this policy are subject to the drug and alcohol testing program beginning the first day they operate or are offered a position to operate school vehicles and continue to be subject to the drug and alcohol testing program as long as they may be required to perform a safety-sensitive function as it is defined in the administrative regulations. Employees with questions about the drug and alcohol testing program may contact the school district contact person, Executive Director of Human Resources, at 3333 North 10<sup>th</sup> Street, Marion, IA 52302.

Employees who violate the terms of this policy may be subject to discipline up to and including termination. Employees who violate this policy bear the personal and financial responsibility, as a condition of continued employment, to successfully participate in a substance abuse evaluation and a substance abuse treatment program recommended by the substance abuse professional. Employees who fail to or refuse to successfully participate in a substance abuse evaluation or recommended substance abuse treatment program will no longer be allowed to operate a commercial motor vehicle owned by the school and in addition may be subject to discipline up to and including termination.

Page 1 of 2

Adopted 12/18/95 Reviewed 2/09; 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised 1/22/07

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) American Trucking Association, Inc. v Federal Highway Administration, 51 Fed. 3<sup>rd</sup> 405 (4<sup>th</sup> Cir. 1995); 49 U.S.C. §§ 5331 et seq. (1994); 42 U.S.C. §§ 12101 et seq. (1994); 41 U.S.C. §§ 701-707(1996); 49 C.F.R. Pt. 40; 382; 391.81-123 (2002); 34 C.F.R. Pt. 85(2002); Local, Internat’l Assoc. of Fire Fighters, AFL-CIO, and City of Burlington, PERB No. 3876 (3-26-91) Iowa Code §§ 124; 279.8; 321.375(2); (730.5 2005).

## PERSONNEL

Policy Title DRUG AND ALCOHOL TESTING PROGRAM

Code 403.19

It is the responsibility of the superintendent to develop administrative regulations to implement this policy in compliance with the law. The superintendent will inform applicants of the requirement for drug and alcohol testing in notices or advertisements for employment.

The superintendent will also be responsible for publication and dissemination of this policy and supporting administrative regulations and forms to employees operating school vehicles. The superintendent will also oversee a substance-free awareness program to educate employees about the dangers of substance abuse and notify them of available substance abuse treatment resources and programs.

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Adopted 12/18/95 Reviewed 2/09; 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised 1/22/07

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) American Trucking Association, Inc. v Federal Highway Administration, 51 Fed. 3<sup>rd</sup> 405 (4<sup>th</sup> Cir. 1995); 49 U.S.C. §§ 5331 et seq. (1994); 42 U.S.C. §§ 12101 et seq. (1994); 41 U.S.C. §§ 701-707(1996); 49 C.F.R. Pt. 40; 382; 391.81-123 (2002); 34 C.F.R. Pt. 85(2002); Local, Internat'l Assoc. of Fire Fighters, AFL-CIO, and City of Burlington, PERB No. 3876 (3-26-91) Iowa Code §§ 124; 279.8; 321.375(2); (730.5 2005).





## DRUG AND ALCOHOL TESTING PROGRAM NOTICE TO EMPLOYEES

Employees governed by the drug and alcohol testing policy are hereby notified they are subject to the school district's drug and alcohol testing program for pre-employment drug testing and in addition are subject to random, reasonable suspicion and post-accident drug and alcohol testing as outlined in the Drug and Alcohol Testing Program policy, its supporting documents and the law.

Employees who operate school vehicles classified as "commercial motor vehicles" by the U.S. Department of Transportation are subject to drug and alcohol testing. A "commercial motor vehicle" is a vehicle that transports sixteen or more persons including the driver or has a gross vehicle weight rating (GVWR) of 26,001 pounds or more. For purposes of the drug and alcohol testing program, "employees" also includes applicants who have been offered a position to operate a commercial motor vehicle owned by the school. Employees that will operate a school-owned commercial motor vehicle are subject to the drug and alcohol testing program regulations beginning the first day they are offered a position to operate a school vehicle and continue to be subject to the drug and alcohol testing program until such time employment is terminated or the employee will no longer operate, at any time, a commercial motor vehicle for the school.

It is the responsibility of the superintendent to inform employees of the drug and alcohol testing program requirements. Employees with questions regarding the drug and alcohol testing requirements will contact the school district's contact person.

Employees governed by the Drug and Alcohol Testing Policy are further notified that employees violating this policy, its supporting documents or regulations will be subject to discipline up to and including termination.

Employees governed by the Drug and Alcohol Testing Policy are further notified it is a condition of their continued employment to comply with the Drug and Alcohol Testing Program policy, its supporting documents, regulations and the law. It is a condition of continued employment for employees operating a school vehicle to notify their supervisor of any prescription medication they are using. Drug and alcohol testing records about a driver are confidential and are released in accordance with this policy, its supporting documents, regulations or the law.

Employees governed by the Drug and Alcohol Testing Policy are hereby notified they are subject to the school district's drug and alcohol testing program for pre-employment drug testing and in addition are subject to random reasonable, suspicion, post-accident, return-to-duty, and follow-up drug and alcohol testing as outlined in the Drug and Alcohol Testing Program policy, its supporting documents, regulations and the law.

Employees are required to participate in and who fail to or refuse to successfully participate in a substance abuse evaluation or recommended substance abuse treatment program will be subject to discipline up to and including termination.

Employees governed by the Drug and Alcohol Testing Policy are further notified that employees violating this policy, its supporting documents, regulations or the law will be subject to discipline up to and including termination. As a condition of continued employment, employees violating this policy, its supporting documents, regulations or the law bear the personal and financial responsibility, as a condition of continued employment, to successfully participate in a substance abuse evaluation and, a substance abuse treatment program recommended by the substance abuse professional. Employees are required to participate in and who fail to or refuse to successfully participate in a substance abuse evaluation or recommended substance abuse treatment program will be subject to discipline up to and including termination.



## DRUG AND ALCOHOL TESTING PROGRAM ACKNOWLEDGMENT FORM

I, \_\_\_\_\_, have received a copy, read and understand the  
(name of employee)  
Drug and Alcohol Testing Program policy and its supporting administrative regulations. I  
consent to submit to the drug and alcohol testing program as required by the Drug and  
Alcohol Testing Program policy, its supporting administrative regulations and the law.

I understand that if I violate the Drug and Alcohol Testing Program policy, its supporting  
administrative regulations or the law, I may be subject to discipline up to and including  
termination or I may be required to successfully participate in a substance abuse  
evaluation and, if recommended, a substance abuse treatment program. If I am required  
to and fail to or refuse to successfully participate in a substance abuse evaluation or  
recommended substance abuse treatment program, I understand I may be subject to  
discipline up to and including termination.

I also understand that I must inform my supervisor of any prescription medication I use.  
I further understand that drug and alcohol testing records about me are confidential and  
may be released in accordance with this policy, its supporting administrative regulations  
or the law.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date



## PERSONNEL

Policy Title ALL PERSONNEL JURY DUTY/WITNESS SERVICE Code 403.20

All employees called to serve on a jury or to testify as a voluntary witness at the request of the District (by subpoena or otherwise) will be paid for the day/hours or days in which the court requires attendance. If employees are subpoenaed to appear in court as witnesses, but not at the request of the District, they will be excused from work in order to comply with the subpoena but will not be paid for time off, unless the employee requests to use his/her available paid personal or vacation leave.

Employees must present any summons to their supervisor on the first working day after receiving the notice. If an employee is not required to serve on a day he/she is normally scheduled to work or if the employee is excused before serving three hours of jury duty, he/she is expected to report to work.

Compensation for jury duty or witness service on behalf of the District will be the difference between his/her normal salary and the compensation for jury duty. Compensation for witness service will be paid only if the employee is summoned for witness service by the District.

Copies of vouchers received from the court showing compensation (excluding mileage) and dates served should be submitted to the Business Office.

Adopted 6/15/70 Reviewed 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised 1/06; 2/2/09

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Chapter 607.2, 607.3



## PERSONNEL

Policy Title EMPLOYEE RELATIONS, APPEARANCE AND CONDUCT Code 403.21

Rules and standards are necessary to protect the health and safety of students, staff, and the community. Through rules, standards and expectations the District provides students, staff and the community an awareness of the dignity and worth of the individual, civic responsibility and respect for authority, as well as a safe and secure environment for optimal working and learning.

Employees are role models for the students who come in contact with them before, during and after school hours. If an employee's conduct could reasonably be expected to have an adverse effect on the employee's continuing ability to perform any of his/her professional functions in an effective manner, discipline up to and including termination may be exercised, even if the conduct occurred outside school hours.

### Employee Relations:

It is the District's expectation that employees maintain a professional working environment that encourages mutual respect, and promotes civil and congenial professional relationships among staff, students and the public.

The District prohibits employees from intentionally harming or threatening to harm other employees, students, or the public or property belonging to any of these parties. This prohibition includes but is not limited to intentional acts such as verbally abusing others, using intimidation tactics and making threats, sabotaging another's work, making malicious, false and harmful statements about others, publicly disclosing another's private information, or using electronic devices for harassment, ~~or~~ bullying or any other behavior that is discourteous, disrespectful or demeaning.

District employees are expected to exercise good judgment and discretion when using social networking and blogging venues such as MySpace, Facebook, Twitter, etc. Content that is published on such blogs is public (for students, parents, the community and administration to view) and the employee is ultimately responsible for his/her posts.

### Appearance:

The Board expects employees to conduct themselves in a professional manner appropriate to the educational environment and as such, employees will be well groomed and dress in attire appropriate for their position. Clothing should be neat, clean and free from inappropriate graphics. Discretion and common sense call for an avoidance of extremes which would interfere with or have a detrimental effect on the educational process. In addition employees are expected to follow appropriate cleanliness practices as needed for the specific job assignment.

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Adopted 6/15/70 Reviewed 12/11; 9/8/14 Revised 1/06; 2/09; 2/10; 3/11; 4/15/13  
Related Policy: (Code Number) IA Code §§ 279.8 (2005); 282 IAC 13  
Legal Reference: (Code of Iowa) \_\_\_\_\_

## PERSONNEL

Policy Title EMPLOYEE RELATIONS, APPEARANCE AND CONDUCT Code 403.21

### Employee Expectations/Conduct:

It shall be the general procedure of the Linn-Mar Community School District to administer progressive discipline to employees who violate Federal/State laws and/or regulations, Board Policy, Administrative Regulations and/or rules, or exhibit unsatisfactory behavior or misconduct.

Employees should refer to specific job descriptions for a full list of required standards, knowledge, skills, abilities and expectations.

### Discipline Process

Violations of this policy are subject to progressive disciplinary action up to and including termination. The following list includes but is not limited to the items which are deemed as infractions which, given sufficient reason and evidence, may result in discipline ranging from minor to major actions.

- Endangerment of children, staff or community members
- Consistent poor judgment
- Harassment or bullying of students, employees, or community members
- Treating coworkers, supervisors, students, public or volunteers in a discourteous, inattentive or unprofessional manner
- Creating conflict with students, staff or community members
- Engaging in any unethical or lascivious conduct
- Being dishonest, including but not limited to deception, fraud, lying, cheating or theft
- Spreading malicious rumors
- Demonstrating insubordination
- Engaging in vulgar, offensive or abusive language or conduct toward others
- Fighting
- Smoking or using nicotine or tobacco products on District property or at District events
- Demonstrating gross misconduct or other serious violations of District policies or procedures
- Refusing to work with, communicate, or speak to students or staff
- Failing to report injuries, damage to or an accident involving District equipment
- Working under the influence of a controlled substance, including possession of or use of imitation or counterfeit controlled substance or improper use of legally prescribed medications
- Possessing, being under the influence of or drinking intoxicants on the job
- Possessing and/or carrying a weapon on District property, including the parking lot
- Willful and/or consistent violation of safety rules/regulations
- Contributing to unsanitary or unsafe conditions

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Adopted 6/15/70 Reviewed 12/11; 9/8/14 Revised 1/06; 2/09; 2/10; 3/11; 4/15/13

Related Policy: (Code Number) IA Code §§ 279.8 (2005); 282 IAC 13

Legal Reference: (Code of Iowa)

## PERSONNEL

Policy Title EMPLOYEE RELATIONS, APPEARANCE AND CONDUCT Code 403.21

- Horseplay which shows disregard for safety, comfort or work performance of co-workers, District, students, and community members
- Disclosing confidential records or information (District, personnel or student information)
- Using the facility's computer systems, including accessing confidential computer files and data, without authorization
- Sabotaging, damaging, abusing or destruction of District-owned and/or District or co-worker owned equipment or property and/or unauthorized use of such equipment
- Willful violation of Federal/State laws and/or regulations, Board Policy, Administrative Regulations and/or rules
- Failing to comply with licensure and certification requirements
- Falsifying District records, such as employment applications and time cards, in any way
- Using District computer, telephones or equipment for unauthorized purposes (District issued technology is subject to inspection at any time)
- Initiating, developing and/or maintaining inappropriate relationships with either adults or students
- Removing, posting or altering required notices on any bulletin board on District property without permission of an immediate supervisor or the Human Resources Department
- Copying District documents, software, etc, for personal use without authorization
- Using District communications systems inappropriately
- Presenting false claim for benefits
- Time card violations (including falsification and/or clocking in while not working)
- Working unauthorized time, abusing or violation of working hours, break periods or lunch periods
- Leaving the workplace during the scheduled workday without notification and permission
- Leaving the assigned work area or facility without notification and permission
- Loitering, excessive non-work related visiting or deliberate inattention to duties during work hours, including but not limited to, utilizing social media, Pinterest, etc.
- Failure to perform required/assigned work duties and/or incompetence
- Working on personal jobs during the scheduled work day
- Being absent for three or more days without notification or permission (also referred to as a voluntary quit or job abandonment)
- Being absent for less than three days without notification or permission
- Sleeping while on duty
- Negligence
- Not following District attendance procedures
- Violation of other rules or policies not specifically listed

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Adopted 6/15/70 Reviewed 12/11; 9/8/14 Revised 1/06; 2/09; 2/10; 3/11; 4/15/13

Related Policy: (Code Number) IA Code §§ 279.8 (2005); 282 IAC 13

Legal Reference: (Code of Iowa)

## PERSONNEL

Policy Title EMPLOYEE RELATIONS, APPEARANCE AND CONDUCT Code 403.21

While the following progressive discipline process is used as a general guideline when administering discipline for minor infractions, the seriousness of each individual infraction will determine which level of discipline is administered up to and including termination. The District reserves the right to skip any level as deemed appropriate.

- First Offense: Verbal Counseling – documented
- Second Offense: Written Warning
- Third Offense: FINAL Written Warning – may be accompanied by unpaid suspension up to five day and/or termination
- Fourth Offense: Termination
- Performance Improvement Plan (Optional)

Whenever an employee has been involved in a disciplinary situation that has not been readily resolved or when the employee has demonstrated an inability to perform assigned work responsibilities efficiently, the direct supervisor, in consultation with the Human Resources Department, may place the employee on a performance improvement plan. This status will last for a predetermined amount of time not to exceed 90 calendar days. Within this time period, the employee must demonstrate a willingness and ability to meet and maintain the conduct and/or work requirements as specified by the supervisor and the District. At the end of the performance improvement period, the employee will either be returned to regular employee status or, if established goals are not met, termination may occur.

Because of FLSA requirements, exempt employees will not be suspended without pay for less than a week.

### Absenteeism and Tardiness:

Unscheduled, unexcused absences due to injury or illness, even when following appropriate guidelines, may still be deemed excessive. Discipline for otherwise unexcused tardiness and absenteeism is generally applied per District procedures.

### Certified Staff:

Licensed employees of the school district, including administrators, will follow the code of ethics for their profession as established by the Iowa Board of Educational Examiners.





## PERSONNEL

Policy Title STAFF DEVELOPMENT

Code 403.22

The Linn-Mar Board of Directors recognizes that well-trained personnel are essential to effective performance, use of knowledge, and a productive learning environment. To meet the ever-changing student needs, staff development is viewed as necessary, systemic and continuous to improving district programs and employee performance.

The Board, superintendent, and all administrators and managers shall expect all employees to participate in a staff development program that is aligned with the district's strategic plan and school/district improvement plan that is designed to develop and enhance staff performance.

Critical to this process is participant collaboration in the program. Therefore, the following elements will be part of the collaborative process for staff development:

- Assessment of the learning needs of employees;
- Prioritization of these needs so that individual and organizational needs are met simultaneously;
- Allocation of budget funds based upon these priorities;
- Provision of an appropriate variety of training opportunities;
- Assess the effectiveness of each development program; and
- Evaluation of the results to the Board of Directors.

The Board is committed to the development of a comprehensive staff development program that ultimately improves employee performance and student achievement levels.

Adopted 7/19/99 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised 3/13/06

Related Policy: (Code Number) 401.7; 401.14; 403.8

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

### EXTENDED LEAVE FOR EMPLOYEES WHO HAVE A SERIOUS HEALTH CONDITION DUE TO

Policy Title ILLNESS OR INJURY Code 403.23

#### I. EXTENDED LEAVE FOR EMPLOYEES WHO HAVE EXHAUSTED FMLA LEAVE

If an employee who is eligible for leave under the Family and Medical Leave Act (FMLA) has an illness or injury, including Workers' Compensation illness or injuries, requiring a leave of absence for more than the time the employee has available through the FMLA, the District will, with satisfactory written medical evidence, grant "Extended Leave" for up to an additional 13 weeks beyond the leave available under the FMLA, for a total of twelve (12) weeks of FMLA leave plus thirteen (13) additional weeks, in a twelve (12) month rolling period. The employee's job will not be held open during an Extended Leave. At the end of the Extended Leave, the District will grant the employee reinstatement to an available open position for which the employee is qualified if the employee is able to perform the essential functions of the available open position with or without reasonable accommodation.

The employee will be responsible for paying the total cost of the health insurance premiums on any health insurance coverage, including supplemental life and dental insurance, the employee or the employee's family is receiving through the District during this Extended Leave period. The District will not provide insurance opt-out contributions while an employee is on Extended Leave. Employees must use any paid (or unpaid personal time off provided specifically by a negotiated agreement) time off during the Extended Leave and will not accrue additional leave time during the thirteen (13) weeks of the Extended Leave.

#### II. EXTENDED LEAVE FOR EMPLOYEES WHO ARE NOT ELIGIBLE FOR FMLA LEAVE

If an employee who is not eligible for leave under the FMLA has an illness or injury, including Worker's Compensation illness or injuries, requiring a leave of absence, the District will, with satisfactory written medical evidence, provide an Extended Leave for a total of eight weeks in a twelve month rolling period. The employee's job will not be held open during an Extended Leave. At the end of the eight week period, the District will grant the employee reinstatement to an available open position for which the employee is qualified if the employee is able to perform the essential functions of the available open position with or without reasonable accommodation. The employee will be responsible for the employee's share of the total cost of the health insurance premiums on any health insurance coverage the employee or the employee's family is

## PERSONNEL

### EXTENDED LEAVE PERIOD FOR EMPLOYEES WHO HAVE A SERIOUS HEALTH CONDITION DUE TO ILLNESS OR INJURY

Policy Title \_\_\_\_\_ Code 403.23

receiving through the District during the Extended Leave. Employees must use any paid (or unpaid personal time off provided specifically by a negotiated agreement) time off during the Extended Leave and will not accrue additional leave time during these eight weeks of Extended Leave.

### III. GENERAL PROVISIONS

While on any leave, employees are required to report periodically to their supervisor and/or Human Resources in writing, at least every thirty (30) days, regarding the status of their medical condition and their intent to return to work. Employees may be required to provide medical evidence substantiating their need for continued leave.

If at the end of the Extended Leave under either Section I or II, there are no available open positions which the employee is qualified to perform, or if because of illness or injury an employee is still not able to return to employment because the employee is unable to perform the essential functions of any available open positions, either with or without reasonable accommodation, the employee shall be separated from employment unless the employee still has paid (or unpaid personal time off provided specifically by a negotiated agreement) time off available. Once any remaining paid (or unpaid personal time off provided specifically by a negotiated agreement) time off is exhausted, if there are no available open positions which the employee is qualified to perform, or if because of illness or injury an employee is still not able to return to employment because the employee is unable to perform the essential functions of any available open positions, either with or without reasonable accommodation, the employee shall be separated from employment.

If there is any law or provision that requires the District to grant leave beyond that provided in this Policy based on the facts in a particular case, the District will follow the requirements of that law.



## PERSONNEL

Policy Title AMERICANS WITH DISABILITIES ACT Code 403.24

The Americans with Disabilities Act (ADA) requires employers to reasonably accommodate qualified individuals with disabilities. It is the policy of the Linn-Mar Community School District to comply with all Federal and State laws concerning the employment of persons with disabilities.

It is the Linn-Mar Community School District's policy not to discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment.

The Linn-Mar Community School District will reasonably accommodate qualified individuals with a temporary or long-term disability so that they can perform the essential functions of a job.

An individual who can be reasonably accommodated for a job, without undue hardship, will be given the same consideration for that position as any other applicant.

All employees are required to comply with safety standards. Applicants who pose a direct threat to the health or safety of other individuals in the workplace, which threat cannot be eliminated by reasonable accommodation, will not be hired. Current employees who pose a direct threat to the health or safety of the other individuals in the workplace will be placed on appropriate leave until an organizational decision has been made by the superintendent or designee in regard to the employee's immediate employment situation.

### **Definitions**

As used in this policy, the following terms have the indicated meaning and will be adhered to in relations to the ADA policy.

- "Disability" refers to a physical or mental impairment that substantially limits one or more of the major life activities of an individual. An individual who has such an impairment, has a record of such an impairment, or is regarded as having such an impairment is a "disabled individual."
- "Direct threat to safety" means a significant risk to the health or safety of others that cannot be eliminated by reasonable accommodation.

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Adopted 3/13/06 Reviewed 2/09; 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) § 281-95.3 (256); 29 C.F.R Part 1630; 161-8.26 (216);  
ADA Amendments Act of 2008

## PERSONNEL

Policy Title AMERICANS WITH DISABILITIES ACT

Code 403.24

- A “qualified individual with a disability” means an individual with a disability who, with or without reasonable accommodation, can perform the essential functions of the employment position that the individual holds or has applied for.
- “Reasonable accommodation” means making existing facilities readily accessible to and usable by individuals with disabilities, job restructuring, part-time or modified work schedules, reassignment to a vacant position, acquisition or modification of equipment or devices, adjustment or modification of examinations, adjustment or modification of training materials and similar activities.
- “Undue hardship” means an action requiring significant difficulty or expense by the employer. The factors to be considered in determining an undue hardship include: (1) the nature and cost of the accommodation; (2) the overall financial resources of the district; (3) the number of persons employed; (4) the effect on expenses and resources or other impact upon the district; (5) the overall number of employees; and (6) the operations of the entire district. These are not all of the factors but merely examples.
- “Essential job functions” refers to those activities of a job that are the core to performing said job for which the job exists that cannot be modified.

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Adopted 3/13/06 Reviewed 2/09; 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) § 281-95.3 (256); 29 C.F.R Part 1630; 161-8.26 (216);  
ADA Amendments Act of 2008



Code 403.24-E

LINN-MAR COMMUNITY SCHOOL DISTRICT  
EMPLOYEE REQUEST FOR ACCOMMODATION

Employee Name: \_\_\_\_\_

Current Position: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

*Employee – Upon completion, please submit this document to your direct supervisor or the Human Resources Department.*

Identify your condition(s) and indicate how you believe each condition affects your ability to perform the essential functions of your job:

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State the accommodations you are requesting and any alternate suggestions:

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\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Human Resources

\_\_\_\_\_  
Date Received



## PERSONNEL

Policy Title EMPLOYEE OUTSIDE EMPLOYMENT Code 403.25

The Board believes the primary responsibility of employees is to the duties of their position within the school district as outlined in their job description. The Board considers an employee's duties as part of a regular, full-time position as full-time employment. The Board expects such employees to give the responsibilities of their positions in the school district precedence over any other employment.

It is the responsibility of the superintendent or designee to counsel employees, whether full-time or part-time, if, in the judgment of the superintendent or designee and the employee's immediate supervisor, the employee's outside employment interferes with the performance of the employee's duties required in the employee's position within the school district.

The Board may request the employee to cease the outside employment as a condition of continued employment with the school district.

Adopted 3/13/06 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) §§20.7, 279.8 (2005)



## PERSONNEL

Policy Title EMPLOYEE POLITICAL ACTIVITY Code 403.26

Employees will not engage in political activity upon property under the jurisdiction of the Board. Activities including, but not limited to, posting of political circulars or petitions, the distribution of political circulars or petitions, the collection of or solicitation for campaign funds, solicitation for campaign workers, and the use of students for writing or addressing political materials, or the distribution of such materials to or by students are specifically prohibited.

Violation of the policy may be grounds for disciplinary action.

Adopted 3/13/06 Reviewed 2/09; 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) §§ 55; 279.8 (2005)





## PERSONNEL

Policy Title PAY DEDUCTIONS

Code 403.27

### EXEMPT EMPLOYEES:

The District provides unpaid leaves of absences to allow employees to be absent from work. As public employers, school districts are expected to record and monitor the work that employees perform and to conform to principles of public accountability in their compensation practices.

Consistent with principles of public accountability, it is the policy of the District that full day deductions from pay are permissible in the following situations:

- When an exempt employee is absent from work for one or more full days, if the deduction is made in accordance with a bona fide plan, policy or practice of providing compensation for salary lost due to sickness or disability.
- When an exempt employee is absent from work for one or more full days for personal reasons other than sickness or disability.
- To offset compensation received when missing work for jury duty, attendance as a witness or temporary military leave.
- For disciplinary suspensions of one or more full days imposed in good faith for infractions of safety rules of major significance.
- For disciplinary suspensions of one or more full days imposed in good faith for workplace conduct rule infractions.

The District is not required to pay the full salary in the initial or terminal week of employment; for penalties imposed in good faith for infractions of safety rules of major significance, or for weeks in which an exempt employee takes unpaid leave under the Family and Medical Leave Act. In these circumstances, either partial day or full day deductions may be made.

In addition, the District provides a variety of leaves of absence to allow employees to be absent from work. As a public employer, the district is expected to record and monitor the work that employees perform and to conform to principles of public accountability in its compensation practices. Therefore it is the policy of the District that when an employee is absent from work for less than one work day, the employee's pay will be reduced or the employee will be placed on leave without pay in the following circumstances:

PERSONNEL

Policy Title PAY DEDUCTIONS

Code 403.27

- The employee has not sought permission to use paid leave for this partial-day absence.
- The employee has sought permission to use paid leave for this partial-day absence and permission has been denied.
- The employee's accrued paid leave has been exhausted.
- The employee chooses to use leave without pay.

In each case in which an employee is absent from work for part of a work day, a deduction from compensation will be made or the employee will be placed on leave without pay for a period of time which is equal to the employee's absence from the employee's regularly scheduled hours of work on that day.

ALL EMPLOYEES:

As a public entity, all overpayments of wages and under deducted benefits must be collected from an employee. Payroll deductions for employees are allowable when the District has determined:

- Regular wages (including overtime) have been overpaid
- Supplemental wages have been overpaid
- Benefits deductions have not occurred or need to be corrected

If a payroll deduction is deemed necessary, a District representative will contact the affected employee to discuss repayment options.



## ADMINISTRATIVE REGULATIONS REGARDING PAY DEDUCTION

The District complies with all applicable laws with respect to payment of wages and benefits to employees including laws such as the federal Fair Labor Standards Act and the Iowa Wage Payment Collection Act. The District will not make pay deductions that violate either federal or state laws.

Any employee who believes that the District has made an inappropriate deduction or has failed to make proper payment regarding wages or benefits is encouraged to immediately consult with the appropriate supervisor. Alternatively, any employee may file a formal written complaint explaining the nature of the improper deduction and the payroll date(s) in question with the Executive Director of Human Resources. Within 15 business days of receiving the complaint, the Executive Director of Human Resources will make a determination as to whether the pay deductions were appropriate and provide the employee with a written response that may include reimbursement for any pay deductions that were not appropriately made.

In the event of an error, adjustments shall be made in compensation the following pay period.

This complaint procedure is available in addition to any other complaint process that also may be available to employees.

Adopted 4/03/06 Reviewed 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



Code 403.27-E

LINN-MAR COMMUNITY SCHOOLS

PAY DEDUCTION COMPLAINT FORM

This form is to be used for all pay deduction complaints. Any employee who believes the District has made an inappropriate deduction is encouraged to immediately consult with their direct supervisor. The employee may also file this complaint with the Executive Director of Human Resources explaining the nature of the improper deduction.

Name of Employee: \_\_\_\_\_

Department/Building: \_\_\_\_\_

Payroll Date(s): \_\_\_\_\_

Amount of improper pay deduction: \_\_\_\_\_

Explanation of improper pay deduction :

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

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

Employee Signature: \_\_\_\_\_

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



## PERSONNEL

Policy Title USE OF COMPUTER AND THE INTERNET

Code 403.28

All employees are responsible for maintaining systems security. Employees with access to a computer are responsible for safeguarding their password(s) to ensure that no transaction takes place under that password for which they are not responsible. Under no circumstances should employees reveal their password to another individual. Passwords and encryption keys must be made available to the District's IT Department upon request. If a District need should arise in which it is necessary to obtain access to a specific computer in the absence of the assigned user, appropriate management authorization must be obtained. Passwords should be changed and reset when the employee returns to work.

Although employees may have their own passwords for accessing email, the Internet, and computers issued to them, District computers and the information that is received or transmitted through them is the property of the Linn-Mar Community School District. In the case of a paid coach or paid activity sponsor who is not a regular employee, who has the need to communicate with students as a representative of the District, he/she should use a District email account created by Linn-Mar Technology Services staff. The individual utilizing a Linn-Mar email address for the purpose of support activities must be approved by the superintendent and will be subject to Policy 403.28 and 603.12-R1 regarding the conduct and expectations for employees.

The District reserves the right to monitor the use of District equipment by employees and others and as the Linn-Mar Community School District is a public employer, employees should have no expectation of privacy with regard to any information contained on computers to which they have access. Employees with access to a computer will not:

- Download software without approval from the Technology Department. Software that is approved for downloading must be registered to the Linn-Mar Community School District;
- Copy software unless authorized by the Technology Department;
- Knowingly introduce a computer virus, worm, "Trojan Horse," or any other contaminating or destructive features into the District's computers;
- Transmit copyrighted materials without permission;
- Download files from the Internet except for an express business purpose;
- Transmit, forward, or download material that is offensive, abusive, pornographic, obscene, profane, discriminatory, harassing, insulting, derogatory, inflammatory, fraudulent or otherwise unlawful;

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Adopted 2/2/09 Reviewed 12/11; 4/13 Revised 2/10; 1/11; 3/18/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code 279.8; 282 I.A.C. 25, 26

## PERSONNEL

Policy Title USE OF COMPUTER AND THE INTERNET

Code 403.28

- Transmit Use email or the Internet for any purpose that is illegal, against District policy, or contrary to the Linn-Mar Community School District's best interest;
- or disseminate the District's confidential information (such as student information), etc., to any outside source without an express business purpose or authorization;
- Gamble and/or participate in fantasy sport leagues;
- Participate in instant messaging that is not related to the employee's work;
- Solicit non District business or use District email or Internet for personal gain including outside employment, self-employment, and family-owned businesses;
- Write or participate in blogs that injure, disparage, and/or defame the District, its students, staff or community, and/or its employees' reputations by name of implication;
- Receive or forward unsolicited emails that violate District policy;
- Attempt to defeat any security mechanisms to gain unauthorized access to computer files or other information on the Linn-Mar Community School District's telephone systems, electronic communication systems, or information systems;
- Attempt to read, intercept, copy or delete emails between other users;
- Post or transmit any message anonymously or under a false name or permit any other individual to do so;
- Impersonate another person;
- Collect information about others without their consent or
- Establish or foster relationships that are inappropriate.

Employees may encounter information on the Internet that relates to the Linn-Mar Community School District or its services. Should such information be encountered, employees should not respond but instead should bring the information to the attention of their immediate supervisor. The District will determine if a response is appropriate to the information.

Brief and occasional personal use of the Internet is acceptable as long as it is not excessive or inappropriate, does not occur during work time, does not violate any of the prohibitions listed above, and does not result in expenses to the Linn-Mar Community School District. The Superintendent and/or designee reserves the exclusive right to determine whether any use is inappropriate, excessive and/or violates this policy.

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Adopted 2/2/09 Reviewed 12/11; 4/13 Revised 2/10; 1/11; 3/18/13; 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code 279.8; 282 I.A.C. 25, 26



## PERSONNEL

Policy Title USE OF PERSONAL ELECTRONIC DEVICES AND  
DISTRICT TELEPHONES AND CELL PHONES Code 403.29

### District Cell Phone

District telephones are a vital part of our day to day operations. Because of the large volume of business transacted by telephone, personal use of the telephone should be limited and personal calls should be brief.

District cell phones are furnished to certain employees in connection with their duties. Employees, who are issued cell phones by the Linn-Mar Community School District should limit personal use of cell phones in the same way they need to limit personal use of their office telephone. *Employees that have excessive cell usage, as determined by administration, for personal calls will be subject to corrective action up to and including termination.*

The Linn-Mar Community School District requires the safe use of its cell phones by employees while conducting business. Employees should not use the cell phones while driving because of safety concerns, but should instead pull to the side of the road to make or receive telephone calls and/or read/send text messages. If unable to pull over or stop prior to receiving a cell phone call, employees should utilize a hands-free device for increased safety, keep the business conversation brief, and immediately locate a safe area to park. The Linn-Mar Community School District does not permit employees to drive while using a hand-held cell phone.

### Personal Cell Phones and Electronic Devices

During work time, employees should limit the use of their personal cell phones or electronic devices, including but not limited to, social media, Pinterest, etc. Employees should set personal cell phones on the silent ring mode during work hours to avoid disturbing those working around them.

### Use of Personal Cell Phones or Electronic Devices

Regardless of whether a cell phone is District-issued or personal in nature, employees should never use any type of photographic feature on their cell phones to take pictures on school premises, while conducting school business, or at school sponsored functions without receiving written permission from administration unless the photograph(s) are to be used to document conduct that is in violation of Board policy, damage to District property, an accident on District property or involving District vehicles, or to document public activities or events honoring employees, students or the District.

Adopted 2/2/09 Reviewed 1/11; 12/11; 9/8/14 Revised 2/10; 4/15/13  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title ARREST AND CRIMINAL CHARGE NOTIFICATION Code 403.30

Employees of the District must notify the office of Human Resources of any arrests, the filing of any criminal charges, and the disposition of any criminal charges pending against them.

Notification to Human Resources should occur within three (3) business days of notification to the employee. Except for employees whose duties require possession of a Commercial Drivers License simple misdemeanors do not need to be reported by employees.

Employees must notify the office of Human Resources of any child abuse complaints filed against them. Employees must notify Human Resources regarding the findings in any complaint against them alleging child abuse. Notification of Human Resources of any complaints and findings should occur within three (3) business days of notification to employee.

Current employees shall report any felony convictions or founded complaints of child abuse that occurred within five years of the date this policy was adopted.

Information relating to arrests, criminal charges and child abuse complaints shall be treated and maintained as part of the employee's confidential file.

The Executive Director of Human Resources shall report all notification to the superintendent who shall review the relationship of the criminal charge, child abuse complaint or felony conviction to the performance requirements of the employee's job.

Employees who do not notify the District as required under this policy may be subject to disciplinary action up to and including termination.

Adopted 2/2/09 Reviewed 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) Iowa Code §§ 232.68-69; 235A; 279.8; 280.17 (1999);  
441 I.A.C. § 152, 155, 175





## PERSONNEL

### WORKERS' COMPENSATION

Policy Title – INJURY/ILLNESS ON THE JOB

Code 403.31

Any employee reporting a work-related injury or illness will receive immediate and appropriate medical treatment. All applicable federal, state, and local laws or regulations pertaining to occupational injuries or illnesses will be followed and complied with at all times.

#### Reporting

It is the responsibility of all employees to report immediately in writing to their supervisor all work-related injuries or illnesses regardless of how insignificant or minor the injury or illness may appear at the time. Employee Work Injury Report forms are provided for this purpose and may be obtained from building supervisors or Human Resources. The supervisor will then complete a Supervisor's Investigation Report within 48 hours of the injury. Failure to report an injury or illness as required by state law and District policy could result in loss or delay of compensation benefits, and possibly lead to corrective action up to and including termination.

An approved physician *from a designated treatment center* must treat the injured employee. Specialists will be assigned by the District in certain cases. Any treatment other than that approved by the District may not be compensable.

Injuries occurring in the course of employment are paid for by workers' compensation insurance. Worker's compensation insurance pays all medical costs, without a deductible provision, and is paid for exclusively by the District. There are well-defined provisions that must be met to ensure that employees qualify for worker's compensation benefits.

Work-related injuries or illnesses must be immediately reported in writing to the employee's supervisor. The worker's compensation insurer will investigate all late reported claims. Where facts cannot be verified, the claim will be denied. Any claim for an injury or illness caused by an employee's willful misconduct, alcohol or drug usage, or that occurs during the employee's voluntary participation in any off-duty recreational, social, or athletic activity sponsored by the District, will not be compensable. Worker's compensation fraud is a felony punishable by fines and/or jail time. The District will prosecute any individual found to be claiming a work-related illness or injury fraudulently.

#### Benefits

There are two types of workers' compensation benefits paid to an employee with a work-related injury or illness. These are medical and wage replacement benefits. Medical benefits include the following:

PERSONNEL

WORKERS' COMPENSATION

Policy Title – INJURY/ILLNESS ON THE JOB

Code 403.31

- Physician's fees or health care provider fees – the approved physician or health care provider who provides treatment is paid through the workers' compensation insurer.
- Hospital fees – paid in full.
- Pharmacy costs – paid in full if prescribed by an approved physician.
- Special costs – any other medical costs including, but not limited to braces, crutches, physical therapy, and rehabilitation therapy, if deemed necessary by an approved physician or health care provider will be paid in full according to state law.

In the event the injury is of the nature that requires outside medical treatment, employees will use personal illness leave for the first three days following the injury. The insurance company will not pay for the first three days of absence until after the employee's absence exceeds fourteen days.

Worker's compensation laws provide for a waiting period of three days before injured employees become eligible for wage replacement benefits. Employees will be covered for the period of disability to the limit allowed under the state worker's compensation law.

Wage replacement benefits are paid by the workers compensation carrier during the time employees are temporarily disabled because of a work-related injury or illness. Employees receive a percentage of their salary as set by state law.

A public employer shall not supplement an employee's workers' compensation benefits by reducing the employee's sick leave unless the employer first notifies the employee of the employee's options to supplement the employee elects to so supplement. A signed document indicating the employee's option is required by the District.

Employees who decline temporary modified duty in order to return to work from a leave of absence due to a workers' compensation injury will be considered to have resigned and will be terminated. Any employee refusing temporary modified duty for which they are qualified will not be eligible for benefits under worker's compensation regardless of their family and medical or District extended leave status.

An employee who fails to return to work after being released by an approved physician will be considered to have resigned and will be terminated.

Page 2 of 2

Adopted 2/2/09 Reviewed 2/10; 12/11; 4/13 Revised 3/28/11; 9/8/14  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) Iowa Admin. Code 876; 85; 279.4; 613.17



Code 403.31-E

## WORKER'S COMPENSATION FORM

During the 1984 General Assembly, the legislature enacted Senate File 2295, which amended Section 85.38 of the Iowa Code, to add the following:

**PROHIBITION OF SUPPLEMENTATION OF WORKERS' COMPENSATION BENEFITS.**  
A public employer shall not supplement an employee's workers' compensation benefits by reducing the employee's sick leave, vacation leave, or earned compensatory time entitlements, unless the employer first notifies the employee of the employee's options to supplement and the employee elects to so supplement.

The insurance company will not pay for the first three days of absence until after the employee's absence exceeds fourteen days.

Based on the above information, please choose one of the following:

\_\_\_\_\_ No, I do not want my workers' compensation benefits supplemented

\_\_\_\_\_ Yes, I do want my workers' compensation benefits supplemented with sick leave pay.

\_\_\_\_\_  
Employee's Printed Name

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

Adopted 2/2/09 Reviewed 2/10; 3/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_



## PERSONNEL

Policy Title EMPLOYEE ASSISTANCE PROGRAM Code 403.32

The Board established the Employee Assistance Program (EAP) to provide professional, confidential assistance for any type of personal problem. The program is designed to encourage early intervention and awareness of such problems and to offer help at the earliest opportunity. Employees are responsible for their performance and for taking constructive action to resolve any personal problems that affect or threaten to affect their on-the-job behavior. Supervisors are responsible for remaining alert to all instances of substandard work performance and bringing these instances to the attention of the employee, along with an offer of assistance, at the earliest indication of a recurrent problem.

Utilization of the EAP is on a voluntary basis, unless an employee is given a mandatory referral by a member of management as a condition of continued employment. It is important to note that if an employee is given a mandatory referral, the only information the District receives is that the employee is in the program, is cooperating and keeping his/her appointments.

The decision to seek or accept assistance through the EAP will not adversely affect an employee's job security or advancement opportunities. However, participation in the EAP in no way relieves the employee of the responsibility to meet acceptable work performance and attendance standards.

All full-time and part-time employees, members of an employee's household, and benefit-eligible dependents are eligible to receive assistance through the EAP. The EAP will not reveal any information that the individual discloses to the EAP except in the following circumstances:

The employee consents in writing, the law requires disclosure or it is believed that life or safety is threatened by non disclosure.

Adopted 2/2/09 Reviewed 2/10; 1/11; 12/11; 4/13; 9/8/14 Revised \_\_\_\_\_  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title AFFIRMATIVE ACTION

Code 403.33

The Linn-Mar Community School District is committed to identifying and eliminating past and present effects of discrimination in employment including policies and practices that pose barriers to equal employment opportunity.

To achieve equal opportunity, the District recognizes the need to take affirmative action to identify classifications with under-representation of minorities, members of diverse racial/ethnic groups, females and persons with disabilities, to set goals and timetables for increasing the employment of under-represented groups and to develop an affirmative action plan for implementing those reasonable goals through outreach, recruitment, training, and other special activities and commitments.

The Affirmative Action Plan helps enable the District to:

- Employ the most qualified person for the position
- Fully utilize the available talent pool
- Be fair and just
- Provide diverse role models for students and better prepare students for living and working in diverse communities and for success in a global economy
- Reduce stereotypes
- Increase credibility with all stakeholders
- Encourage and support economic development and entice investment in Iowa

The Linn-Mar Community School District Affirmative Action Plan will be distributed annually to each covered location. Staff will be provided periodic professional development regarding their responsibilities for implementation of the Affirmative Action Plan. A report shall be given to the Board of Directors annually.

Inquiries regarding compliance with equal educational or employment opportunities and/or affirmative action shall be directed to the Executive Director of Human Resources or the Equity Coordinator, Linn-Mar Community School District, 3333 North Tenth Street, Marion, Iowa 53202. Inquiries may also be directed, in writing, to the Iowa Civil Rights, 400 E. 14<sup>th</sup> Street, Des Moines, IA, 50319, (800) 457-4416, the Director of the Region VII Office of the United States Equal Employment Opportunity Commission, 601 East 12<sup>th</sup> Street – Room 353, Kansas City, MO, 64106, (800) 368-1019, or the U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Bldg., 400 Maryland Avenue, SW, Washington, DC, 20202-1100, (800) 421-3481.

Adopted 2/2/09 Reviewed 2/10; 1/11; 12/11; 4/13; 2/14; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title EMPLOYEE TERMINATION – VOLUNTARY/INVOLUNTARY Code 403.34

The Linn-Mar Community School District will ensure that employee terminations are handled in a professional manner with minimal disruption to ongoing work function.

There are three types of terminations:

1. Voluntary
2. Involuntary
3. Death

### 1. Voluntary Termination

Voluntary termination of employment occurs when an employee informs his or her supervisor of employee's resignation, or termination is deemed to have occurred when an employee is absent from work for three consecutive workdays and fails to contact his or her immediate supervisor (job abandonment).

- a. Employees are expected to provide a minimum of two weeks' notice of their intention to separate from the District in order to allow a reasonable amount of time to transfer ongoing workloads. It is expected that written notification will be provided to the employee's immediate supervisor.
- b. Human Resources, in conjunction with the immediate supervisor, will coordinate the employee's out-processing. This process includes:
  1. Returning all company property (i.e., keys, ID cards, parking passes, District equipment, etc.)
  2. Review of benefits status
  3. Completion of an exit interview questionnaire

Licensed employees are required to follow Board Policy 401.7 – Licensed Personnel Resignation.

Adopted 2/2/09 Reviewed 2/10; 1/11; 12/11; 4/13 Revised 9/8/14

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_

## PERSONNEL

Policy Title EMPLOYEE TERMINATION  
VOLUNTARY/INVOLUNTARY Code 403.34

### 2. Involuntary Termination

An involuntary termination of employment, to include reductions in force, is a District-initiated dismissal.

- a. Discharge may be for any reason, i.e., misconduct, tardiness, absenteeism, unsatisfactory performance, etc. In some cases progressive discipline may be used, prior to termination, to correct a performance problem. However, certain types of employee misconduct are so severe that one incident of misconduct will result in immediate dismissal without prior use of progressive discipline.
- ~~b. Prior to an involuntary termination, consideration will be given to an employee's service and past contribution to the District. The possibility of transfer or demotion will be explored in all cases except those which involve gross misconduct.~~

Involuntary termination of a licensed employee will follow the process stipulated in the master agreement, if applicable.

### 3. Death

A termination due to the death of an employee will be made effective as of the date of death.

### FINAL PAY

An employee who resigns or is discharged will be paid through the last day of work, plus any unused/accrued vacation leave, if applicable, and applicable unused paid personal days, minus advances or other agreements the employee may have with the District. Final pay due upon the death of an employee will be paid to the deceased employee's estate.

Employees are not paid for unused sick leave days upon termination of employment.



## PERSONNEL

Policy Title SOCIAL NETWORKING

Code 403.35

Electronic social networking sites shall be used in accordance with Board policies on bullying, harassment, work requirements, and conduct for the purpose of promoting learning and associated communication. Use of social media that violates those policies, is disrespectful, demeaning or used for purposes other than learning and associated communication will be subject to the prescribed behavioral disciplinary process for adults and students.

Electronic social networking includes, but is not limited to: YouTube, Twitter, My Space, Facebook, LinkedIn, blogs and web sites.

The superintendent is responsible for administrative regulations on the use of social networking media.

<i>Cross Reference:</i>	<i>104</i>	<i>Anti-Bullying/Harassment Policy</i>
	<i>104-R</i>	<i>Administrative Regulations Regarding Anti-Bullying/Harassment Policy</i>
	<i>403.13</i>	<i>Harassment</i>
	<i>403.14</i>	<i>Sexual Harassment</i>
	<i>403.21</i>	<i>Employee Relations, Conduct and Appearance</i>
	<i>502.1</i>	<i>Student Conduct</i>
	<i>502.1-R1</i>	<i>Administrative Regulations Regarding Student Conduct Procedures</i>
	<i>502.14</i>	<i>Student-to-Student Harassment</i>
	<i>502.14-R</i>	<i>Administrative Regulations Regarding Student-to-Student Harassment</i>
	<i>603.12</i>	<i>Technology and Instructional Materials</i>
	<i>603.12-R1</i>	<i>Administrative Regulations Regarding the Internet</i>
	<i>603.12-R2</i>	<i>Administrative Regulations Regarding the Internet – Appropriate Use</i>
	<i>603.12-E1</i>	<i>Internet Access Permission Letter to Parents/Guardians/Legal Custodians</i>
	<i>603.12-E2</i>	<i>Internet Use Agreement, Staff</i>

Adopted 3/28/11 Reviewed 12/11; 4/13 Revised 9/8/14  
Related Policy: (Code Number) 104; 104-R; 403.21; 403.13; 403.14; 502.1; 502.1-R1;  
502.14; 502.14-R; 603.12; 603.12-R1; 603.12-R2;  
603.12-E1; 603.12-E2  
Legal Reference: (Code of Iowa) 20 U.S.C. §§ 1221-1234i (1994)





## PERSONNEL

### SAFETY ACCOUNTABILITIES AND RESPONSIBILITIES

Policy Title \_\_\_\_\_ Code 403.36

#### **Purpose:**

To meet the District's fundamental mission of educating children who live within the corporate boundaries of Linn-Mar Community School District, it is critical that the District promote and provide for the safety and health of all employees. To that purpose the following defines the safety and health responsibilities for all levels of employees within the District and provides a framework for measuring the risk management performance of all individuals within the District.

#### **Responsibilities:**

##### **Administration**

District administration is responsible for providing a safe and healthful workplace for our employees. Administrators, managers and supervisors will be responsible for administering the Safety Management Program policies and procedures that include the safety and claims management processes to control and minimize the cost.

Administration, managers and supervisors will also provide performance evaluation guidelines and establish training materials as needed; and will monitor to ensure that the guidelines are met.

##### **Employees**

Responsibilities include but are not limited to adherence to District safety rules, safe work procedures, bringing unsafe acts and conditions to the attention of administration and to cooperate with the claims management process.

#### **Superintendent:**

##### **Responsibilities**

1. Provide leadership and visible support for the safety management program throughout the District.
2. Commit the necessary resources to maintain and improve the safety management program.
3. Establish controls and accountability systems necessary to assure effective administration of the safety management program.

PERSONNEL

SAFETY ACCOUNTABILITIES  
AND RESPONSIBILITIES

Policy Title \_\_\_\_\_ Code 403.36

Duties

1. Review annual safety and claims cost performance.
2. Evaluate the effectiveness of the safety management programs.
3. Maintain effective and prompt safety and claims management communication through line organization to administration.
4. Assure safety and claims management performance is discussed at regularly schedule meetings.

Accountabilities

1. Annual claims cost meet District goals.
2. Ensure communication of safety topics at professional development and/or staff meetings.

**~~Associate Superintendent~~ Executive Director of for Support Services**

Responsibilities

1. Provide leadership and visible support for the safety management program.
2. Resource for District in implementing and managing the safety management program.
3. Resource for regulatory issues that may affect the Districts operation and safety management program.
4. Demonstrate leadership and communication responsibility for all Federal, State, and District policies and regulations on safety procedures and practices.
5. Monitor compliance of Federal, State, Board Policies and regulations, and administer appropriate notice and discipline.

Duties

1. **Collaborate with Human Resources to develop** annual safety and claims management objectives.
2. Ensure established safety rules and regulations are followed.
3. ~~Develop~~ **Enforce** alternative safety and claims management procedures or actions to meet risk management goals.
4. Establish acceptable housekeeping standards, defining areas of responsibility for maintenance and inspection.
5. Keep the Superintendent informed on regulatory agency regulations (new or revised) that may affect the Districts operation.
6. Resource for the organization during regulatory agency visits and/or corresponding with the agency.
7. Member of District Safety Committee.

Page 2 of 5

Adopted 9/10/12 Reviewed 4/13 Revised 9/8/14  
Related Policy: (Code Number) \_\_\_\_\_  
Legal Reference: (Code of Iowa) \_\_\_\_\_

## PERSONNEL

### **SAFETY ACCOUNTABILITIES AND RESPONSIBILITIES**

Policy Title \_\_\_\_\_ Code 403.36

#### Accountabilities

1. Provides timely advice, and/or resources, and reports to Superintendent to meet the safety management goals.

#### **Human Resources:**

#### Responsibilities

1. Implement the District Safety Improvement Plan to develop a strong safety attitude and clear understanding of duties and responsibilities for each employee.
2. Maintain adequate controls to assure that the Safety Improvement Plan requirements are met.
3. Support the claims management procedures to meet the District goals.

#### Duties

1. Set annual safety improvement goals in collaboration with ~~Associate Superintendent~~ **Executive Director** of Support Services.
2. Review safety claims management performance for the District and communicate the results to Superintendent.
3. Investigate (or assists in the investigation of) all accidents within the District.
4. Participate in regularly scheduled safety meetings.
5. Communicate safety and health issues to all principals/employees.
6. Analyze problem areas and take corrective actions as needed.
7. Make periodic observation of principals' safety activities and report to Superintendent.
8. Provide alternative duty jobs for persons injured on the job.
9. Direct insurance carrier/consultants loss control and claims services to meet the Districts' risk management goals.

#### Accountabilities

1. Complete necessary safety and ~~helath~~ **health** projects.
2. Safety inspection recommendation compliance.
3. OSHA recordable injury and illness rates compare to District goals.
4. Safety contacts with employees to monitor the effectiveness of the program.
5. Ensure safety inspections are completed monthly.
6. Accident investigations are performed completely and in a timely manner.
7. Assist in training employees on safe work procedures and proper protective equipment usage.
8. Cooperate with the claims management process.

PERSONNEL

SAFETY ACCOUNTABILITIES  
AND RESPONSIBILITIES

Policy Title \_\_\_\_\_ Code 403.36

**Principals/Assistant Principals/School Administration Managers:**

Responsibilities

1. Train assigned employees on safe work procedures and proper protective equipment usage.
2. Ensure that safe work procedures are followed and proper protective equipment is being used.
3. Ensure that safe condition of the work environment, including good housekeeping, is maintained.
4. Maintain equipment in safe working order and notify appropriate personnel if, and when, repairs are necessary.

Duties

1. Make daily inspections of facility work area and take immediate steps to correct unsafe conditions and work practices.
2. Ensure that employees follow safe job procedures.
3. Report on safety activities (including deficiencies) to the next level of administration.
4. Require each employee to maintain good housekeeping.
5. Require employees to use proper lifting techniques and material handling procedures.
6. Take necessary action to ensure monthly safety inspections are completed by appropriate staff.
7. Ensure that proper personal protective equipment is worn and maintained.
8. **Collaborate with Human Resources** to conduct safety meetings with employees on a regular basis.
9. Conduct accident investigations; determine corrective action and follow up to see that those selected are implemented effectively.

Accountabilities

1. Safety meetings are conducted at times determined by the District.
2. Safety inspections are completed at times determined by the District.
3. Investigate all accidents within the department and submit a report in accordance with District procedures.
4. Follow and enforce safety rules and regulations.

PERSONNEL

SAFETY ACCOUNTABILITIES  
AND RESPONSIBILITIES

Policy Title \_\_\_\_\_ Code 403.36

**Employees**

Responsibilities

1. Follow safe work procedures and take an active part in protecting themselves, their fellow employees and students.
2. Understand the hazards and safety precautions to reduce or eliminate those hazards before undertaking any assignment.
3. Report all unsafe conditions, practices and behavior to administrator and make suggestion for their correction.
4. Report all injuries to their immediate supervisor and obtain first aid or medical help in accordance with District procedures.
5. Participate in the continuous improvement of the company's safety management guidelines
6. Fully cooperate with the claims management process.

Duties

1. Comply with written safety and health rules.
2. Follow approved methods of performing their jobs.
3. Wear and maintain proper personal protective equipment as required.
4. Come to work each day mentally and physically capable to safely performing their duties.
5. Report safety hazards, unsafe behaviors by others and any other safety related questions or concerns to their immediate supervisor.
6. Assist in problem solving and safety management guidelines improvement.
7. Maintain good housekeeping throughout their area of influence.
8. Cooperate with the claims management process.



## PERSONNEL

Policy Title SAFE WORKPLACE REGULATIONS/PROCEDURES

Code 403.37

The basic objective of the safety program is to prevent accidents and injuries and to reduce operating costs by following safe practices. The use of safe practices protects employees, prevents lost time, equipment and property damage, and reduces expenditures of funds for medical care, compensation, and liability. To accomplish these tasks, a sound safety program focusing on accident prevention must be integrated into the day-to-day activities of each employee. All employees must think, talk, and work safely.

Safety related rules and policies are necessary for the well being of all employees. Safety rules, policies and procedures are established by the District to govern conduct while at work, and to promote a safe work environment for all employees.

Any employee who commits an act which violates accepted safety rules/policies/procedures will be disciplined, up to and including termination of employment. The nature of the discipline will depend upon the nature of the violation and the surrounding circumstances.

### **Violations That May Result In Disciplinary Action Being Issued**

The following list of reasons for safety related discipline is not intended to be all inclusive; the mere fact that a possible violation is not listed does not mean that it would not result in disciplinary action.

- Horseplay, such as running, shoving, pushing, throwing objects, and/or any type of horseplay which could jeopardize your safety or the safety of others.
- Failure to report injuries as instructed in the District Work Injury Reporting Procedures or refusing to give information to any member of management.
- Failure to report observed unsafe behavior or conditions.
- Violation of any District accepted safety procedure, policy, program or rule.
- Causing unsafe conditions or carelessness in regards to safety to self or others, or failure to properly use safety devices (including required personal protective equipment, or tampering with safety equipment.
- Intentional misuse of or damage to equipment, vehicles, or property of others.
- Using poor judgment that results in an injury or accident.

The aforementioned list constitutes some, but not necessarily all, of the kinds of conduct that will result in disciplinary action, up to and including termination of employment.

Page 1 of 2

Adopted 9/10/12 Reviewed 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_

PERSONNEL

Policy Title SAFE WORKPLACE REGULATIONS/PROCEDURES

Code 403.37

**Disciplinary Action**

While the progressive discipline process is used as a general guideline when administering discipline for minor infractions, the seriousness of each individual infraction will determine which level of discipline is administered up to and including termination. The District reserves the right to skip any level as deemed appropriate.

- First Offense: Verbal Counseling – documented
- Second Offense: Written Warning
- Third Offense: FINAL Written Warning – may be accompanied by unpaid Suspension up to five days and/or termination
- Fourth Offense: Termination

Adopted 9/10/12 Reviewed 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



## PERSONNEL

Policy Title MODIFIED DUTY RETURN TO WORK PROGRAM

Code 403.38

In order to maintain a safe work experience for an employee returning from an injury, the District has adopted a return-to-work policy for any employees that have experienced work-related injuries. This program is designed to keep employees involved in their work environment and to assist them in continuing to be a productive member of the workforce by returning to full earning capacity as soon as possible. This program also reduces the District's long-term insurance costs and avoids future premium increases.

Every effort will be made to meet the medical restrictions injured employees may face. If an employee is assigned a light duty job it is considered to be temporary assignment. As such, light duty jobs are reserved for those employees with temporary disabilities. The school district will work with the medical community and insurance company to provide work that meets the medical restrictions of the employee when possible. These job duties may be associated with tasks within the structure of the school district or tasks in the community.

### **Employee Responsibilities**

The employee must:

- Be aware of all medical restrictions at all times.
- Not attempt tasks that exceed medical restrictions. If the employee has a question about the task(s) at hand and restrictions, the employee should talk to his/her physician. If necessary, get new restrictions in writing that allow for the performance of these tasks.
- Understand that the medical restrictions are in effect 24 hours per day.
- Be careful during non-work hours to be sure that the restrictions are maintained. For hobbies or outside interests, talk to the treating physician about possible conflicts. Follow the physician's instructions.
- Report for work to all "light duty" jobs on time and ready to work. Failing to report to, or being late for "light duty" jobs, has the same consequences as if absent or late for regular duty jobs.
- Engage in activities that are consistent with medical restrictions and/or treatment patterns, whether on or off the job. If not, he/she is subject to possible disciplinary action up to and including termination of employment.

Page 1 of 2

Adopted 9/10/12 Reviewed 4/13/ 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



PERSONNEL

Policy Title MODIFIED DUTY RETURN TO WORK PROGRAM

Code 403.38

**Administrative Responsibilities**

The Administrator, Manager or Supervisor shall:

- Take time to handle injuries properly.
- Authorize medical attention immediately, if needed.
- Provide necessary authorization forms.
- Investigate the circumstances of the reported injury and record all pertinent data.
- Determine preventative measures or actions and make corrections immediately.
- Explain all modified jobs in detail to the employee and point out any safety precautions that may exist.
- Know the employee and his or her medical restrictions. Make sure you and the employee do not exceed the restrictions unintentionally.
- Add validity to the practice by keeping informed about the employees' recovery, current treatment, and how the employee perceives the quality of medical treatment. The quality of treatment is directly related to how fast the employee recovers and avoids re-injury in the future.

Page 2 of 2

Adopted 9/10/12 Reviewed 4/13; 9/8/14 Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) \_\_\_\_\_



TO: \_\_\_\_\_

RE: Modified Duty Practice

Returning injured employees to work through a Modified Duty Program is vital to an employee's earning power and critical to controlling our Workers Compensation costs. Linn-Mar Community School District is exploring every opportunity to ensure that our employees are returned quickly and smoothly to full earning capacity after a severe or serious work injury. We are also actively pursuing every option available to conserve our financial and human resources.

For these reasons, we are committed to the viability of our Modified Duty Program. We have a number of modified or lighter duty jobs that would be suitable for injured employees, and which can accommodate a variety of medical restrictions. Furthermore, we will abide in good faith to any medical restrictions you or other medical providers may establish. We consider our Modified Duty Program to be a practical and responsible practice, and one which the medical community can support as beneficial to employees.

You are presently treating an employee of Linn-Mar Community School District and if he/she could perform any restricted/limited duty activities until full recovery is achieved, I would appreciate your direction in this matter.

Thank you for your consideration of this matter.

Respectfully,

Karla Christian, PHR  
Executive Director – Human Resources

Telephone : 319•447•3036  
Fax : 319•377•9252  
Email [kchristian@linnmar.k12.ia.us](mailto:kchristian@linnmar.k12.ia.us)

Adopted: 9/10/12 Reviewed 4/13; 9/8/14 Revised: \_\_\_\_\_



## PERSONNEL

Policy Title

EMPLOYEE BACKGROUND CHECKS

Code 4XX

The District believes in hiring and using quality employees and supports appropriate background checks for all employees to promote staff and student safety. Therefore, the Board authorizes the superintendent or designee to access and review specific information for each applicant for employment and every current employee pursuant to this policy.

### Applicants for Employment

For every applicant for employment with the District, the superintendent or designee shall access and review certain background information for the applicant prior to hiring the applicant. The superintendent or designee shall access and review background information regarding the applicant from the following sources:

1. The Iowa court information system available to the general public.
2. The sex offender registry system available to the general public.
3. The central registry for child abuse information.
4. The central registry for dependent adult abuse information.
5. The national criminal history database.

### Continuing Compliance

As required by law, current employees of the District will be subject to background rechecks every five years, based on their initial date of hire. Positions exempt from this District recheck include teachers, administrators, school business officials, school administration managers, paraprofessionals and non-teaching coaches, provided that these positions are subject to Board of Educational Examiners authorization for either initial licensure or renewal.

The superintendent or designee may utilize a background check service that meets the legal requirements to access this information.

The District shall not charge an employee for the cost of the registry checks required. The District will maintain documentation demonstrating compliance with the required background check procedures.

Adopted \_\_\_\_\_ Reviewed \_\_\_\_\_ Revised \_\_\_\_\_

Related Policy: (Code Number) \_\_\_\_\_

Legal Reference: (Code of Iowa) SF 452, Iowa Code 279.69, 272.2 (17), 279.13 (1.b.), 279.13, 321.375 (2)



## PERSONNEL

Policy Title PREGNANCY DISCRIMINATION Code NEW

The Linn-Mar Community School District will comply with all Federal and State laws concerning the employment of persons who are affected by a current pregnancy, past pregnancy, potential pregnancy or other medical condition that is related to pregnancy or childbirth.

The Linn-Mar Community School District will not discriminate against women affected by pregnancy, childbirth or related medical conditions in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment including medical benefits and leave. Linn-Mar Community School District prohibits the harassment of a woman because of pregnancy, childbirth or related medical condition.

The Linn-Mar Community School District will reasonably accommodate individuals whose pregnancy-related impairment is considered a disability under the Americans with Disabilities Act (ADA) so that they can perform the essential functions of a job.

An individual who can be reasonably accommodated for a job, without undue hardship, will be given the same consideration for that position as any other applicant.

The Linn-Mar Community School District will also accommodate nursing mothers, for up to one year after the birth of their child, by providing a reasonable break time and a private location other than a bathroom to express milk.

### **Definitions**

As used in this policy, the following terms referenced from the Americans with Disabilities Act have the indicated meaning and will be adhered to in relation to the PD policy.

- “Disability” refers to a physical or mental impairment that substantially limits one or more of the major life activities of an individual. An individual who has such an impairment, has a record of such an impairment, or is regarded as having such an impairment is a “disabled individual.”
- A “qualified individual with a disability” means an individual with a disability who, with or without reasonable accommodation, can perform the essential functions of the employment position that the individual holds or has applied for.

- “Reasonable accommodation” means making existing facilities readily accessible to and usable by individuals with disabilities, job restructuring, part-time or modified work schedules, reassignment to a vacant position, acquisition or modification of equipment or devices, adjustment or modification of examinations, adjustment or modification of training materials and similar activities.
- “Undue hardship” means an action requiring significant difficulty or expense by the employer. The factors to be considered in determining an undue hardship include: (1) the nature and cost of the accommodation; (2) the overall financial resources of the district; (3) the number of persons employed; (4) the effect on expenses and resources or other impact upon the district; (5) the overall number of employees; and (6) the operations of the entire district. These are not all of the factors but merely examples.
- “Essential job functions” refers to those activities of a job that are the core to performing said job for which the job exists that cannot be modified.

THOMAS BUS SALES (4) BUSES  
DCFS USA, LLC

INSTALLMENT PAYMENT SCHEDULE

	DATE	LOAN	PAYMENT	INTEREST	PRINCIPAL	PAYOFF	DATE PD	CK #
LOAN	8/1/2009	\$314,228.00				\$314,228.00		
1	8/1/2009		\$58,094.48	0.00	\$58,094.48	\$257,863.20	7/30/2009	#13112
2	8/1/2010		\$58,094.48	\$11,130.88	\$46,963.60	\$210,354.72	7/27/2010	#13562
3	8/1/2011		\$58,094.48	\$9,089.97	\$49,004.51	\$160,895.88	7/27/2011	#600001
4	8/1/2012		\$58,094.48	\$6,960.36	\$51,134.12	\$109,406.62	8/25/2012	#600341
5	8/1/2013		\$58,094.48	\$4,738.21	\$53,356.27	\$55,803.58	7/11/2013	#600606
6	8/1/2014		<u>\$58,094.48</u>	<u>\$2,419.46</u>	<u>\$55,675.02</u>	\$0.00		
GRAND TOTALS		\$314,228.00	\$348,566.88	\$34,338.88	\$314,228.00			

\*Transfer of \$58,094.48 from PPEL to Debt Service for FINAL payment of bus lease.

To: Dr. Katie Mulholland, Rick Ironside, Kim Buel

From: Bob Anderson

Re: Initial Information regarding potential Choir Europe Trip in June 2015

Date: August 22, 2014

#### **Rationale, Purpose, and Objectives of the trip**

Since June of 2003, the Linn-Mar High School Choral Department, has offered a European Tour once every 3 years. We are planning to offer this opportunity in June of 2015. This is a cultural tour that brings a real life experience and extends the learning of historical and artistic concepts taught in the curriculum of vocal music at Linn-Mar High School.

#### **Justification of an overnight trip**

Travel in Europe requires overnight stays.

#### **Detailed Plans for student supervision**

- Mr. Anderson and Mrs. Schmidt will travel with the group and coordinate the supervision
- We will recruit parent chaperones to assist in the supervision at a rate of 1 chaperone to 10 students for the trip
- Students will be divided into groups and assigned a specific chaperone for supervision and communication
- There will specific guidelines in regard to movement in any location, meal times, curfew each day, and other activities for the group

**Complete itinerary is attached**

#### **Resource manuel**

- Each student participant will complete an emergency contact and medical information card.
- We will carry contact information for Kim Buel with us for administrative issues.
- We will have a tour guide with us for the entirety of the trip that will have first aid, health, and emergency needs information for each city we are visiting.

# Linn-Mar High School Choir American Celebration of Music in Portugal & Spain

Custom Tour #8 (8 nights/10 days)

## Day 1

Depart via scheduled air service to Lisbon, Portugal

## Day 2

Lisbon

(D)

Arrive in Lisbon

Meet your MCI Tour Manager, who will assist the group to the awaiting chartered motorcoach

Enjoy a half-day guided tour of Lisbon including Eduardo VII Park, Castelo de Sao Jorge, the Sé (the main cathedral which was once a fortress), Belem Tower, and entrance to Jeronimos Monastery, including its Cloisters and its Igreja de Sta Maria de Belem

Late afternoon hotel check-in

Evening Welcome Dinner and overnight

*Lisbon is one of Europe's most visually striking capitals, built on a series of hills with scenic vistas from every angle. The almost constant presence of sunshine and the River Tagus transforms the Portuguese capital into a mirror of a thousand colors - highlighting the city's unique architecture and beauty*

## Day 3

Lisbon

(B,D)

Breakfast at the hotel

*Participate/sing in Mass at Jeronimos Monastery\**

Lunch on own

Afternoon excursion along the scenic 'Coast of the Sun'. Explore little fishing villages and white sand beaches on one of Europe's most westerly outreaches. Pass through Estoril. Continue to Cascais where highlights "Boca do Inferno" and the magnificent panorama of the Bay of Cascais. Pass the famous Guincho beach, to Cabo da Roca (the most western point of Europe)

Return to Lisbon

*Concert as part of the American Celebration of Music in Portugal\**

Evening dinner and overnight

## Day 4

Lisbon / Algarve / Seville

(B,D)

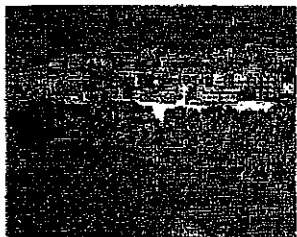
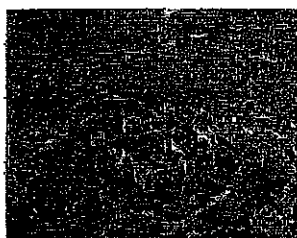
Breakfast at the hotel

Transfer to Seville via the Algarve Region, known for its beaches, nature reserves, picturesque villages, and the vibrant colors of the landscape. Pass through Albufeira. Albufeira's old town with its pretty cobbled streets lined with restaurants, cafes and shops is a great place to stroll. Albufeira's waterfront contains sugar candy colored apartments and lovely sandy beaches

Lunch on own

Continue to Faro, full of "old world charm" especially in the old town.

Then it is off to Seville for dinner and overnight



**Music Celebrations International**  
Concert Tours With Integrity



*Seville ranks as one of the world's great tourist centers. Don Juan romanced and Figaro harpered in Seville; today, gypsies still sing age-old ballads, flamenco dancers whirl to the melodies of the guitar and matadors tease rushing bulls*

**Day 5** **Seville** **(B,D)**

Breakfast at the hotel

A morning guided tour of Seville includes Maria Luisa Park, Plaza de España, entrance to the Giralda and the Cathedral. Drive past the Torre del Oro (Gold Tower)

Lunch on own

*Concert as part of the American Celebration of Music in Spain\**

Evening dinner and overnight



**Day 6** **Seville / Cordoba / Toledo** **(B,D)**

Breakfast at the hotel

Transfer to Toledo via Cordoba. A guided tour of Cordoba includes the Mezquita (Mosque). The Mosque was built in the 8th Century and by the 10th Century was one of Islam's most outstanding religious structures, second in size only to the Kaaba in Mecca

Lunch on own

Continue to Toledo for dinner and overnight

*Toledo is one of the great jewels of Spain! It stands out dramatically against the often luminously blue Castilian sky, a golden city rising from a granite eminence, encircled by a steep ravine filled by the green waters of the Tagus. Art at every corner has a tale to be told, every aspect reflecting a brilliant period of Spanish history when the cultures of east and west flourished and fused*



**Day 7** **Toledo / Madrid** **(B,D)**

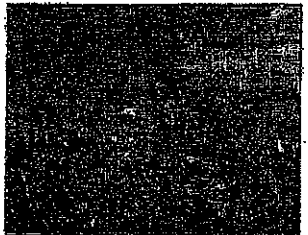
Breakfast at the hotel

Enjoy a guided tour including a visit of the magnificent Cathedral (with the El Greco paintings and other valuable relics) and the Church of St. Tomé (El Greco's *The Burial of the Count of Orgaz*)

Lunch on own

Transfer to Madrid for dinner and overnight

*Madrid is a very hospitable city, known for the quality of its light and climate. Madrid became the capital of Spain in the 16th century when Spain ruled a vast empire. Its attractions include three internationally famous art galleries, a royal palace, grand public squares and many museums filled with treasures of Spain's*



**Day 8** **Madrid** **(B,D)**

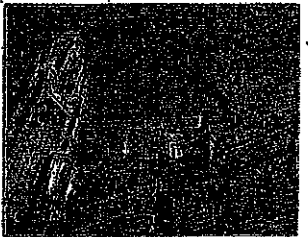
Breakfast at the hotel

A morning guided tour of Madrid includes seeing Plaza Mayor (site of executions, tournaments, bullfights and Inquisition trials), Buen Retiro Park, Royal Palace and entrance to the Prado Museum which hosts one of the finest art collections in the world

Lunch on own

*Concert as part of the American Celebration of Music in Spain\**

Evening dinner and overnight



**Music Celebrations International**  
Concert Tours With Integrity

Day 9

Madrid / El Escorial

(B,D)

Breakfast at the hotel

Half-day excursion to El Escorial, the magnificent palace and monastery built by Phillip II. Visit the Royal Apartments and the Basilica.

*Noon recital at El Escorial\**

A few miles away, view the Valley of the Fallen

Lunch on own

Return to Madrid for afternoon at leisure

Evening Farewell Dinner and overnight



Day 10

Depart for home

(B)

Breakfast at the hotel

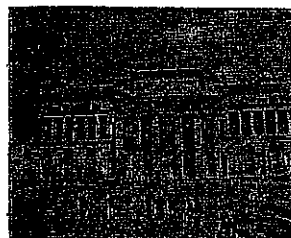
Transfer to Madrid's airport for return flight

*\*Subject to confirmation*



*This is a very flexible itinerary. Except for confirmed appointments and performances, the places of interest and the sequence of sightseeing might be changed if necessary or desirable. In the event of an unavoidable conflict in the performance and the sightseeing schedule, the concert schedule will prevail, and it may be necessary to exclude some sightseeing activities.*

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**Music Celebrations International**  
*Concert Tours With Integrity*



### ADMINISTRATIVE REGULATIONS REGARDING FIELD TRIPS AND EXCURSIONS

A written request for overnight trips must be submitted to the building principal not less than three (3) weeks prior to the proposed trip and prior to any travel arrangements being finalized. The request will include: objectives and purposes of the trip; the need, rationale, and justification for an overnight trip; detailed plans for student supervision on the trip; and a complete itinerary and budget of the trip. The school district will be responsible for obtaining a substitute teacher if one is needed. Following field trips and excursions, the teacher shall submit a written summary of the event.

Overnight trips involving high school students will require the prior approval of a high school administrator and the superintendent or designee.

Overnight trips for the middle and elementary school students will require the prior approval of the Board of Directors.

In authorizing field trips, the principal shall consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity and other factors deemed relevant by the superintendent, including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored field trips unless the event is sanctioned by the state athletic associations.

#### Field Trips Criteria:

The following checklist and application must be submitted for overnight trips along with the required documentation

Criteria		Description	Yes	No
Purpose	Required	The purpose of the field trip/work site visit is clearly defined and "... is a vital part of the curriculum or current activity." Reference: Board Policy 603.3	✓	
Pre-Planning	Required	There is evidence of pre-planning that will maximize the learning experiences of students on this field trip/work site visit. This should include a prior visit by the teachers in charge. This could include evidence that a conscious decision has been made as to whether this field trip/work site visit or excursion is an initial common experience or a culminating experience.	✓	
Follow-up	Required	There is evidence of planning for follow-up in order to maximize the learning experiences of students on this field trip/work site visit or excursion.	✓	
Assessment	Required	There is evidence that students will be required to demonstrate their understanding of the learning/s expected from this experience.	✓	
Funding	Required	A source of funding has been determined that meets Department of Education and District guidelines Reference: Board Policy 603.3	✓	
Common Experience	Recommended	This field trip/work site visit is a common experience that all students at this grade level or activity group should have.	✓	
Multi-disciplinary	Recommended	This field trip/work site visit, excursion addresses more than one curricular area and offers the opportunity for curriculum integration.	✓	
School Administrator Approval		<i>Kim Buehler</i>		Date 8/21/14
District Administrator Approval		<i>Reck H. Hornade</i>		Date 9/3/14
Board Approval				Date

- Students who are eligible for a fee waiver will be covered through the use of contingency or discretionary funds as appropriate.

Adopted 2/1/99 Reviewed 9/08; 7/11; 9/12; 9/13 Revised 10/08; 1/11/10

August 2014

Linn Mar Varsity Poms Nationals competition trip for 2014-15 Season:

The Varsity Dance team at Linn-Mar has earned the privilege to compete at the highest level the past 17 years at Varsity's National Dance Team (NDTC) Competition. The NDTC is the only national-level dance team championship that is endorsed by the National Federation of State High School Associations, the national service and administrative organization for high school athletics and fine arts programs. The rationale for this trip is to provide a learning and growing experience that enables students that have studied the art and physicality of dance, the opportunity to compete at the highest level. The tradition of this trip has enabled the program to be one of the top teams in the state of Iowa as well as national recognition for the school name of Linn Mar. The trip each season inspires students to be their very best both academically and physically. The team consistently has maintained a team GPA ranging from 3.5-3.73.

The traditional trip takes place from a Thursday through Tuesday, returning the students back to school on a Wednesday. All students connect with their teachers prior to departure to determine what needs to be completed prior to the trip. The trip is chaperoned by the head coach and assistant coach, as well as most every parent travels alongside with the team. Head coach makes all the flight and ground travel plans. This trip requires early planning to take advantage of the lowest pricing. The team has fund raising opportunities that offset the travel expenses. Anything beyond what is raised and equally shared amongst the team, each family is responsible in covering the additional expenses. Head coach outlines at the beginning of season what the anticipated expenses will be, and offers opportunities to raise extra funds that fall within the teams (3) fund raising activities. This trip typically costs around \$1150 per person. Through team fund raising opportunities, each person earns around half the cost of the trip. The other half is covered by each family.

Itinerary for 2014-15:

Thursday, Jan 29 2015-Team departs from Cedar Rapids Iowa to Orlando Florida

Friday, Jan 30- Team practices from 10am-4pm

Team dinner 6-8pm

Team bed check 9pm

Saturday, Jan 31-Team competes in 2 divisions (jazz and pom) in both the prelims/semi's on Disney property (times/locations TBD)

Sunday, Feb 1- Team competes in 2 divisions (jazz and pom) for Finals on Disney property (times/locations TBD)

Monday, Feb 2- Team visits Disney Parks

Tuesday, Feb 3- Team travels home

Wednesday, Feb 4- Team returns to class

Team will be staying at the Disneys All Star Sports Resort. This is located at :

Address: 1701 W Buena Vista Dr, Lake Buena Vista, FL 32830

Phone:(407) 934-7639

All team members are lodged in the same resort, adjacent rooms to the coaches room. Coach travels with medical cards, insurance information for each student as well as aware of any health issues for each student. Each member signs a waiver that parents and students understand the expectations of the trip, supervision and excludes Linn Mar of any liability. In the event of a health issue, coach would triage the situation, contact the students parents, and if need be, call 911. NDTc provides medical staff at all their venues as well. Generally, 80% of the teams parents/family travel with the team and have access to a vehicle.

Team 2014-15 that will be traveling this season:

For student confidentiality, names not listed.

Timing is imperative in providing the most cost effective trip for the team. As in previous years, I normally determine the flight and airline by July/mid-August. I currently have tickets reserved that will expire by August 28, 2014 if our deposit is not met. I also have a parent meeting set up for August 27<sup>th</sup>, 2014 to share the detail regarding the trip. This procedure that I have outlined has been followed the last 17 years and we have had 100% safety and success with each trip. I appreciate your quick review and consideration. Please let me know if you need anything further.

Allison Schmidt

Varsity Poms Coach



# ADMINISTRATIVE REGULATIONS REGARDING FIELD TRIPS AND EXCURSIONS

A written request for overnight trips must be submitted to the building principal not less than three (3) weeks prior to the proposed trip and prior to any travel arrangements being finalized. The request will include: objectives and purposes of the trip; the need, rationale, and justification for an overnight trip; detailed plans for student supervision on the trip; and a complete itinerary and budget of the trip. The school district will be responsible for obtaining a substitute teacher if one is needed. Following field trips and excursions, the teacher shall submit a written summary of the event.

Overnight trips involving high school students will require the prior approval of a high school administrator and the superintendent or designee.

Overnight trips for the middle and elementary school students will require the prior approval of the Board of Directors.

In authorizing field trips, the principal shall consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity and other factors deemed relevant by the superintendent, including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored field trips unless the event is sanctioned by the state athletic associations.

## Field Trips Criteria:

The following checklist and application must be submitted for overnight trips along with the required documentation

Criteria		Description	Yes	No
Purpose	Required	The purpose of the field trip/work site visit is clearly defined and "... is a vital part of the curriculum or current activity." Reference: Board Policy 603.3	✓	
Pre-Planning	Required	There is evidence of pre-planning that will maximize the learning experiences of students on this field trip/work site visit. This should include a prior visit by the teachers in charge. This could include evidence that a conscious decision has been made as to whether this field trip/work site visit or excursion is an initial common experience or a culminating experience.	✓	
Follow-up	Required	There is evidence of planning for follow-up in order to maximize the learning experiences of students on this field trip/work site visit or excursion.	✓	
Assessment	Required	There is evidence that students will be required to demonstrate their understanding of the learning/s expected from this experience.	✓	
Funding	Required	A source of funding has been determined that meets Department of Education and District guidelines Reference: Board Policy 603.3	✓	
Common Experience	Recommended	This field trip/work site visit is a common experience that all students at this grade level or activity group should have.	✓	
Multi-disciplinary	Recommended	This field trip/work site visit, excursion addresses more than one curricular area and offers the opportunity for curriculum integration.	✓	
School Administrator Approval		<i>Tanya Blue</i>	Date	9/3/14
District Administrator Approval		<i>Rick A. Bonadeo</i>	Date	9/4/14
Board Approval			Date	

- Students who are eligible for a fee waiver will be covered through the use of contingency or discretionary funds as appropriate.

Adopted 2/1/99 Reviewed 9/08; 7/11; 9/12; 9/13 Revised 10/08; 1/11/10

## **National FFA Convention - 2014**

**Sponsorship:** FFA Advisor Barb Lemmer

**Supervision:** We all go as a group to the various activities of the convention. No one wonders off to do their own thing!

**Adherence to the district Code of Conduct and completion of appropriate documentation** by parents and students. A copy of the application that student will complete to attend convention has been given to Mark Hutcheson.

**Witten Request:** see details below

### **Rationale/Purpose:**

Develop premier leadership skills, personal growth, and career success skills of the participants through the various activities of the convention.

Two members will compete in the National FFA Agriscience Fair competition.

One member will compete in the National FFA Choir.

One graduate member of the chapter will receive their American FFA Degree.

### **Pre-Planning:**

Complete required paperwork.

Transportation request has been sent to the Transportation Department requesting 1 or 2 rental vehicles depending on the number of FFA members attending convention.

A National Convention Housing Request Form and a \$50 per room deposit has been sent to National FFA Organization to secure four hotel rooms. Waiting for National FFA Organization to confirm reservations.

Leave has been requested on iVisions and SEMS for 4 days...**October 28, 29, 30 and 31. Will return on Saturday, November 1st.**

Convention Registration has just opened and will remain open until October 13. At the next FFA meeting(September 4) we will inform members of the convention and present them with required paperwork to participate.

I have reviewed the **schedule and tentatively determined the schedule that will be followed by all participants. See attached itinerary.** Participants will have a pre-planning meeting going over the various activities and their purposes and expectations of the trip. Students attending will also have a say in the workshops, business sessions, career show activities, competition finals, etc. that they want to participate in or attend. Students will also determine an agribusiness tour that they want to go on Friday afternoon of convention.

**Resource Manual:** I take a folder with all of the paperwork from each participant and have all administrator contacts in my cell phone. Sonny Deke also attends the convention from Linn-Mar and he also assist me and my students as needed. The National FFA Organization has a cell phone app for different convention situations that I utilize. First aid stations are located throughout the convention complex.

Agriscience competitors are working on their display board and final presentation for competition.

The choir participant is working with her music teacher to meet the expectations of the choral director of the National FFA Choir.

The American Degree recipient has completed the required award application and completed an interview reviewing her SAE program and FFA participation from the past 7 years.

**Follow-up:** Participants will meet after the convention to prepare a report that will highlight educational benefits of attending the convention and they will share that information with the other FFA members of the chapter at the November chapter meeting. Attendees will set goals related to further participation in FFA activities at the sub-district, district, state, and national level. All FFA members will have the benefit of watching convention highlights on the National FFA Organization webpage.

**Assessment:** Students will reflect on their performances if they have competed in a competitive event. Others that do not compete will evaluate other contestants that they have watched compete. These reflections will be used to help them prepare for future competitions such as sub-district leadership contests, district ag skills career development events, and state agriscience fair competition.

**Funding:** Each student will pay their own registration and hotel fee. They are also responsible for paying for the food that they will eat. Each student will deposit \$300 in the FFA account and then FFA will complete the registration process and hotel payment process. Students are



encouraged to bring \$100-\$125 for food or they can bring a few items with them to reduce the cost of food if they wish. The hotel we hope to stay at should have a free continental breakfast each day which will lower the costs of food for the participants. The chapter will pay for the van rental and the school usually provides us with a fuel card.

**List of Participants:**

For student confidentiality, names not listed.

**Common Experiences:** All participants will attend at least one leadership workshop, one ag career skills workshops, the leadership contests finals, agriscience fair open house, career show including college row, and each convention session, and the agribusiness tour of Friday. 60,000 students are expected to attend ranging from 7 grade to 21 year old...all members of the National FFA organization.

**Multi-disciplinary:** Science will be highlighted at the Agriscience Fair. English is highlighted in the leadership contests finals. 21st Century skills are highlighted at the career show and during the agribusiness tour. Music is highlighted during the convention sessions when the choir, band, and talent entries perform. The National FFA Choir and National FFA Band will put on a concert between the afternoon and evening convention session of one of the days and the talent show participants will put on a Talent Show on one of the days as well! The entire convention is centered around leadership development, personal growth, and career success!



# ADMINISTRATIVE REGULATIONS REGARDING FIELD TRIPS AND EXCURSIONS

A written request for overnight trips must be submitted to the building principal not less than three (3) weeks prior to the proposed trip and prior to any travel arrangements being finalized. The request will include: objectives and purposes of the trip; the need, rationale, and justification for an overnight trip; detailed plans for student supervision on the trip; and a complete itinerary and budget of the trip. The school district will be responsible for obtaining a substitute teacher if one is needed. Following field trips and excursions, the teacher shall submit a written summary of the event.

Overnight trips involving high school students will require the prior approval of a high school administrator and the superintendent or designee.

Overnight trips for the middle and elementary school students will require the prior approval of the Board of Directors.

In authorizing field trips, the principal shall consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity and other factors deemed relevant by the superintendent, including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored field trips unless the event is sanctioned by the state athletic associations.

## Field Trips Criteria:

The following checklist and application must be submitted for overnight trips along with the required documentation

Criteria		Description	Yes	No
Purpose	Required	The purpose of the field trip/work site visit is clearly defined and "... is a vital part of the curriculum or current activity." Reference: Board Policy 603.3	X	
Pre-Planning	Required	There is evidence of pre-planning that will maximize the learning experiences of students on this field trip/work site visit. This should include a prior visit by the teachers in charge. This could include evidence that a conscious decision has been made as to whether this field trip/work site visit or excursion is an initial common experience or a culminating experience.	X	
Follow-up	Required	There is evidence of planning for follow-up in order to maximize the learning experiences of students on this field trip/work site visit or excursion.	X	
Assessment	Required	There is evidence that students will be required to demonstrate their understanding of the learning/s expected from this experience.	X	
Funding	Required	A source of funding has been determined that meets Department of Education and District guidelines Reference: Board Policy 603.3		
Common Experience	Recommended	This field trip/work site visit is a common experience that all students at this grade level or activity group should have.		X
Multi-disciplinary	Recommended	This field trip/work site visit, excursion addresses more than one curricular area and offers the opportunity for curriculum integration.	X	
School Administrator Approval			Date	8/22/14
District Administrator Approval			Date	9/3/14
Board Approval			Date	

- Students who are eligible for a fee waiver will be covered through the use of contingency or discretionary funds as appropriate.

Adopted 2/1/99 Reviewed 9/08; 7/11; 9/12; 9/13 Revised 10/08; 1/11/10

# BIDDING PARTICIPANT PACKAGE

LINN-MAR COMMUNITY SCHOOL DISTRICT, IOWA



SCHOOL INFRASTRUCTURE SALES, SERVICES & USE TAX  
REVENUE BONDS, SERIES 2014

FINANCING PACKAGE

AS OF SEPTEMBER 2014

THE INFORMATION CONTAINED IN THIS PACKET HAS BEEN ASSEMBLED FOR THE PURPOSES OF OBTAINING A LOAN (THROUGH THE ISSUANCE OF THE BONDS AS DESCRIBED HEREIN) FROM PROSPECTIVE PURCHASERS. THE INFORMATION HAS BEEN PROVIDED BY THE LINN-MAR COMMUNITY SCHOOL DISTRICT, IOWA AS THE ISSUER OF THE BONDS.

TO THE BEST OF THE ISSUER'S KNOWLEDGE THIS INFORMATION IS ACCURATE, BUT THE INFORMATION IN THIS PACKET IS NOT INTENDED TO REPRESENT ALL OF THE INFORMATION THAT A PROSPECTIVE PURCHASER MAY CONSIDER RELEVANT TO REVIEW IN CONNECTION WITH APPROVING AND ENTERING INTO THIS TRANSACTION. IT IS EXPECTED THAT PROSPECTIVE PURCHASERS WILL CONDUCT THEIR OWN REVIEW OF THE PROPOSED TRANSACTION AND WILL ASK FOR ANY OTHER INFORMATION THAT THEY DETERMINE IS APPROPRIATE IN MAKING A FINAL DECISION IN CONNECTION WITH THIS TRANSACTION.

THE TERM SHEET CONTAINED HEREIN SUMMARIZES THE PROPOSED STRUCTURE OF THE TRANSACTION. THE ACTUAL TRANSACTION WILL BE AS SET FORTH IN A FINAL LOAN AGREEMENT AND OTHER TRANSACTION DOCUMENTS PREPARED BY THE DISTRICT'S BOND COUNSEL. THESE FINAL DOCUMENTS WILL GOVERN THE TRANSACTION.

THE INFORMATION IN THIS PACKET IS DELIVERED ON A CONFIDENTIAL BASIS FOR USE SOLELY IN THE CONSIDERATION OF THE TRANSACTION. THE INFORMATION MAY NOT BE REPRODUCED OR USED FOR ANY OTHER PURPOSE WITHOUT THE PERMISSION OF THE BORROWER.

# Linn-Mar Community School District, Iowa

## School Infrastructure Sales, Services & Use Tax Revenue Bonds, Series 2014

### Summary of Offering Terms

Issuer	Linn-Mar Community School District, Iowa (the “Issuer”)
Issue	School Infrastructure Sales, Services & Use Tax Revenue Bonds, Series 2014-E (the “Bonds”)
Amount	Approximately \$3,665,000
Purpose	When combined with proceeds of an anticipated 2015 Sales Tax Bond and 2015 or 2016 PPEL Note, and accumulated cash on hand, the project includes the renovation, demolition and new construction to portions of the existing High School building at Marion, Iowa. The entire project is projected to be approximately \$30,000,000.
Expected closing	October 21, 2014  <i>The Series 2014-E Bonds will close prior to January 1, 2015 to assure that the Series 2014-E Sales Tax Bonds and the previously issued Series 2014-A, B, C &amp; D refunding Bonds are all designated as “Bank Qualified”.</i>
Principal Payments	Annually; July 1, 2016 through July 1, 2029
Interest Payments	Semiannually; January 1 <sup>st</sup> & July 1 <sup>st</sup> , beginning July 1, 2015
Call feature	The Issuer desires the most flexible call feature possible, and prefers that the new bonds be “callable at any time.” However, as a bidder you will dictate the call feature by noting it on the bid form. The Issuer will consider all bids and will determine which to accept based upon call feature in addition to other terms of each bid received. The call feature will be only one part of their consideration.
Source of Security	<p>The Bonds are paid from the \$0.01 School Infrastructure Sales Tax (the “SAVE Tax”). The SAVE tax expires December 31, 2029, unless extended by an act of the Iowa Legislature.</p> <p>The Bonds are not repaid from any form of property taxation, are not general obligations and do not constitute an obligation where the Issuer’s “full faith and credit” is pledged to the Bonds.</p>
Revenue Purpose Statement	The District voters approved extension of the Revenue Purpose Statement through the life of the statewide tax (12/31/2029) at an election held June 30, 2009 giving the board authority to spend or borrow from the tax for any purpose permitted by law.
Additional Debt Covenant	<p>No subordinate lien bonds exist.</p> <p>No prior lien obligations may be issued. No additional parity lien obligations secured by the Tax (see “Source of Security” herein) may be issued without coverage, as certified by an independent FA or CPA, of</p>

1.20x.

The proposed Series 2014-E Sales Tax Bonds are on parity with the Series 2010 Bonds, Series 2012 Bonds, Series 2013 Bonds, Series 2014-A and Series 2014-C Bond, and combined must meet the 1.20x coverage test.

Reserve Fund	The Issuer desires completing this funding without a Debt Service Reserve Fund requirement. However, each bidder will be permitted to bid in one or both of the following ways: (1) with a traditional DSRF required and funded upon closing, or (2) with no DSRF requirement. The Issuer will consider all bids and will determine which to accept based upon DSRF in addition to other terms of each bid received. The DSRF will be only one part of their consideration. All previously issued Sales Tax Bonds of the District do have a Debt Service Reserve Fund held by a third-party bank trustee; combined totaling \$4,806,280.
Other Covenants	None, unless specified clearly and specifically in comments you may add to the Bid Form or Offer Letter.
Expected Coverage	Approximately 1.40x at current enrollment and current revenue per student, when combined with the prior outstanding debt payment obligations. However, coverage is anticipated to drop to the 1.20x Additional Bonds Test covenant level once the proposed Series 2015 Bonds are issued next year.
Tax Status	Interest payments on the Bonds will be exempt from federal income taxation.
Bank Qualification	The Issuer will designate the Bonds “qualified investments for banks”.
Form of Bond	Physically registered Bonds will be delivered to the purchaser with CUSIP’s. The Bonds <u>will not</u> be delivered electronically through the DTC system. <i>*If you do not require CUSIP’s to be assigned you can note that on your bid form, and this will save the District the associated fees for assigning those numbers.</i>
The Bond	The Bond Purchase Agreement will specify that the Purchaser acknowledges that: (a) no official statement is being prepared; (b) it has undertaken an independent review of the credit and been provided with all information necessary to Purchase the Bonds; and (c) it intends to hold the Bonds until maturity and does not intend to resell the Bonds.
Bondholders’ Risks	<p>The Bonds are not secured by any form of property taxation.</p> <p>The Bonds are secured by the existing SAVE tax. Collections of the SAVE tax can fluctuate from time to time based on the enrollment of the Issuer, the statewide total public school enrollment and actual collections of sales taxes in the State. Changes in revenues per year could be meaningful.</p> <p>The Bonds will have limited liquidity. The Bonds are not expected to trade due to the lack of an official statement and the restrictions under the Bond Purchase Agreement.</p>
Registrar & Paying Agent	The District will allow the successful bidder to dictate if a Paying Agent is to be designated. If such an agent is desired by the bidder, it will be

Bankers Trust Company (Des Moines). If no such agent is required by your bid form the District's finance staff will handle all payments directly with the winning bidder. If a Paying Agent is required, they will administer the ongoing collection of monthly transfers in advance of the payment due date and making the actual payment when due. If the Paying Agent service is required by your bid form this will add an ongoing annual fee for the District from the Paying Agent of approximately \$500-\$2,500 depending on if the Reserve Fund is also required. This will also be factored into the bid acceptance decision.

Bond Rating

None. In order to reduce expenses to the Issuer, no bond rating will be applied for. Sales Tax issuances from schools in Iowa structured similarly to this issue customarily now receive ratings in the "A-" to "A+" range from Standard & Poors. The Linn-Mar district has a current rating from Standard & Poors for its sales tax bonds of "A+" with a "stable outlook" as assigned in spring 2014 during the refinancing process of prior sales tax bonds. However, this issue will not have any direct rating assigned and the Purchaser is responsible for any credit related inquiries it feels are necessary. The Series 2010, Series 2012, Series 2013, Series 2014-A and Series 2014-C Sales Tax Bonds do have an outstanding rating from S&P of "A+". The District's existing General Obligation Bonds have an outstanding "AA-" rating from Standard & Poors.

Legal Opinion

Ahlers & Cooney P.C.

Financial Advisor














Piper Jaffray & Co.

## Collection and Remittance of the Tax

The Tax is collected by the retailers in the State and remitted at the end of each calendar month to the State. The State Department of Revenue remits the tax to the school corporations on the last day of the next month. The Act requires the State Department of Revenue (the “Department”) to, annually prior to August 15<sup>th</sup> estimate the amount of revenue that will be remitted to the school corporations for the fiscal year beginning each July 1. The Department is required to remit 95% of the annual estimate to the school corporations in monthly installments over the fiscal year, and is allowed to retain 5% of the estimate until the end of the fiscal year, at which time the Department completes an audit of the actual receipts and the actual remittances of the Tax. The Department then reconciles the difference between the actual receipts and the estimated remittances and remits the remaining balance to the school corporations on or around November 1<sup>st</sup> for the fiscal year ending the previous June 30<sup>th</sup> (the “Reconciliation Payment”). It is possible that the Reconciliation Payment is a negative number if actual receipts were less than expected receipts by an amount greater than 5%.

The Tax is remitted to each school corporation in the State based on actual enrollment for the fiscal year in question. The actual enrollment for a fiscal year is determined by a count of those students registered to attend the school corporation as of the first Friday of the previous October (as amended from time to time in the future by the Legislature). Each school corporation now receives an equal amount of revenue from the Tax, per student. Prior grandfather clauses of the prior “local option” tax have now all expired, thus allowing for equal distribution by enrollment statewide.

**Table 1: Estimated Payment Schedule**

Date	Principal Maturity	Semi Annual Interest Payment	Annual P & I This Issue
7/1/2015		82,717	82,717
1/1/2016		59,556	
7/1/2016	260,000 	59,556	379,113
1/1/2017		55,331	
7/1/2017	260,000 	55,331	370,663
1/1/2018		51,106	
7/1/2018	260,000 	51,106	362,213
1/1/2019		46,881	
7/1/2019	260,000 	46,881	353,763
1/1/2020		42,656	
7/1/2020	260,000 	42,656	345,313
1/1/2021		38,431	
7/1/2021	260,000 	38,431	336,863
1/1/2022		34,206	
7/1/2022	260,000 	34,206	328,413
1/1/2023		29,981	
7/1/2023	260,000 	29,981	319,963
1/1/2024		25,756	
7/1/2024	260,000 	25,756	311,513
1/1/2025		21,531	
7/1/2025	260,000 	21,531	303,063
1/1/2026		17,306	
7/1/2026	260,000 	17,306	294,613
1/1/2027		13,081	
7/1/2027	260,000 	13,081	286,163
1/1/2028		8,856	
7/1/2028	260,000 	8,856	277,713
1/1/2029		4,631	
7/1/2029	285,000	4,631	294,263
1/1/2030			
7/1/2030			
Totals:	3,665,000	981,342	4,646,342

\* The Average Maturity under these assumptions is 8.239 years



**Table 2: Preliminary Estimated Sources & Uses of Funds**

<b>SOURCES OF FUNDS</b>		
	Bond Proceeds – Series 2014 Sales Tax	3,640,000
	Bond Proceeds – Series 2015 Sales Tax	9,730,000
	Note Proceeds – Series 2016 G.O. PPEL Notes	16,631,200
<b>TOTAL SOURCES</b>		<b>\$30,001,200</b>
<b>USES OF FUNDS</b>		
	Project Costs – Phase I (Middle School)	30,000,000
	Surplus	1,200
<b>TOTAL USES OF FUNDS</b>		<b>\$30,001,200</b>

**Table 3: Historic Resident Enrollment History of Linn-Mar CSD within Linn County**

<u>Year</u>	<u>Enrollment</u>	<u>Gain</u>	
2001	5,150		
2002	5,261	111	2.16%
2003	5,413	152	2.89%
2004	5,628	215	3.97%
2005	5,780	152	2.70%
2006	6,196	416	7.20%
2007	6,371	175	2.82%
2008	6,490	119	1.87%
2009	6,600	110	1.69%
2010	6,642	42	0.64%
2011	6,730	88	1.32%
2012	6,880	150	2.23%
2013	6,943	63	0.92%
<b>Actual Recent Historic Annual Growth Rate:</b>		<b>149</b>	<b>2.53%</b>

**Table 4: Historic Sales Tax Collections**

The tax was effective July 1, 2007 in Linn County, and runs through December 31, 2029 unless extended by the Iowa Legislature. Presented below is the actual collection history for the period noted on an accrual basis:

<u>Fiscal Year</u>	<u>TOTAL COLLECTIONS</u>	<u>Approximate Per Student</u>
2008	\$5,678,032	\$916
2009	\$6,074,499	\$953
2010	\$6,227,543	\$960
2011	\$6,148,493	\$932
2012	\$6,455,215	\$972
2013	\$5,852,655	\$870
2014*	\$5,986,172	\$870
2015*	\$6,179,243	\$890

\*Revenues prior to FY2013 were based upon actual local revenues within Linn County. Beginning in FY2013 & beyond the revenue paid will be the “statewide average” per pupil.

**Table 5: Pro-forma Future Revenues & Estimated Coverage**

(Assumed Series 2015 Figures Not Included, But Coverage Without Growth is Anticipated to be 1.20x)

Fiscal Year	Combined P&I Payments	1, 4		2, 3, 4	
		No Growth Assumed		Growth Assumed	
		Estimated Collections	Estimated Coverage	Estimated Collections	Estimated Coverage
2015	4,037,162	6,038,131	1.50	6,179,243	1.53
2016	4,323,958	6,038,131	1.40	6,285,981	1.45
2017	4,303,158	6,038,131	1.40	6,394,235	1.49
2018	4,305,858	6,038,131	1.40	6,504,026	1.51
2019	4,304,453	6,038,131	1.40	6,615,373	1.54
2020	4,292,553	6,038,131	1.41	6,728,297	1.57
2021	4,300,175	6,038,131	1.40	6,842,817	1.59
2022	4,287,163	6,038,131	1.41	6,958,955	1.62
2023	4,278,408	6,038,131	1.41	7,076,732	1.65
2024	4,271,708	6,038,131	1.41	7,196,168	1.68
2025	4,272,748	6,038,131	1.41	7,317,286	1.71
2026	4,255,493	6,038,131	1.42	7,440,106	1.75
2027	4,220,298	6,038,131	1.43	7,564,651	1.79
2028	4,096,378	6,038,131	1.47	7,690,942	1.88
2029	4,109,280	6,038,131	1.47	7,819,003	1.90
63,658,787					

1. Assumes no change in statewide enrollment and statewide revenue per student from estimated fiscal year 2013 levels by the Department of Revenue (\$869.67 per student.)
2. Assumes 1% annual increase in statewide revenue per student beginning fiscal year 2015-2016 with no change in statewide enrollment.
3. Assumes 50 student annual increase in District enrollment from Fall 2013 enrollment count.
4. Assumes payment schedule as outlined in Table 1

**Table 6: Recent Yields for Iowa School Sales Tax Issues**

Date	8/11/2014	8/22/2014	8/14/2014	8/6/2014
Issuer	Sioux City CSD	Harris-Lake Park CSD	WACO CSD	North Cedar CSD
Size	\$33,375,000	\$2,800,000	\$1,230,000	\$4,370,000
Reserve Fund	Yes	No	No	No
Rating	A+ / AA Insured	None	None	None
Year-to-Maturity				
1		3.000%	0.700%	2.850%
2	0.500%	3.000%	0.700%	2.850%
3	0.770%	3.000%	2.000%	2.850%
4	1.070%	3.000%	2.000%	2.850%
5	1.420%	3.000%	2.000%	2.850%
6	1.690%	3.000%	2.500%	2.850%
7	1.930%	3.000%	2.500%	2.850%
8	2.180%	3.000%	2.500%	2.850%
9	2.360%	3.000%	3.000%	2.850%
10	2.520%	3.000%	3.000%	2.850%
11	2.690%	3.000%	3.000%	2.850%
12	2.830%	3.000%	3.000%	2.850%
13	3.000%	3.000%	3.500%	3.100%
14	3.110%	3.000%	3.500%	3.100%
15	3.230%	3.000%	3.500%	3.100%
Average Life	7.619 Years	8.613 Years	9.469 Years	9.191 Years
Average Rate	2.979%	3.000%	3.104%	2.972%

## OFFICIAL BID FORM – SALES TAX REVENUE BONDS

To: Board of Directors of the Linn-Mar Community School District, Iowa (the “Issuer”)

Re: \$3,665,000\* School Infrastructure Sales, Services & Use Tax Revenue Bonds, Series 2014-E (the “Bonds”)

For all or none of the above Bonds, in accordance with the Terms of Offering, we will pay you \$3,665,000.00\* and accrued interest, if any, to date of delivery for Bonds bearing interest rates and maturing on July 1<sup>st</sup> in each of the stated years as follows:

<u>Coupon</u>	<u>Due July 1<sup>st</sup></u>	<u>Principal*</u>	<u>Coupon</u>	<u>Due July 1<sup>st</sup></u>	<u>Principal*</u>
_____	2016	\$260,000	_____	2023	\$260,000
_____	2017	260,000	_____	2024	260,000
_____	2018	260,000	_____	2025	260,000
_____	2019	260,000	_____	2026	260,000
_____	2020	260,000	_____	2027	260,000
_____	2021	260,000	_____	2028	260,000
_____	2022	260,000	_____	2029	285,000

We elect to have the Bonds issued as one term Bond\*\*: \_\_\_\_\_YES \_\_\_\_\_NO

We will designate the first available call date to be: \_\_\_\_\_  
(examples would be: “Callable Anytime with 30-days Notice” or “Callable 7/1/2019 or Anytime Thereafter”)

We [\_\_\_\_\_]WILL [\_\_\_\_\_]WILL NOT require the establishment of a Debt Service Reserve Fund, funded to a level meeting all tax code requirements. We understand that if we do require such a reserve fund this will add meaningful levels of ongoing administrative expenses to the District and will reduce upfront proceeds available for the project which will also be factored into determining an overall winning proposal. The District prefers that no DSRF be required.

We [\_\_\_\_\_]WILL [\_\_\_\_\_]WILL NOT require the use of Bankers Trust Company as a third-party Paying Agent for the Bonds. We understand that if we do require the use of the PA this will add meaningful levels of ongoing administrative expenses to the District which will also be factored into determining an overall winning proposal. If no PA is required by this bid form the District will simply make payments directly to us on their semi-annual payment dates.

We [\_\_\_\_\_]WILL [\_\_\_\_\_]WILL NOT require the assignment of CUSIP numbers to the Bonds. Even if CUSIP numbers are assigned, the Bonds will be physically registered and delivered to the purchaser.

This bid is for prompt acceptance and for delivery of said Bonds to us in compliance with the Terms of Offering, which is made a part of this proposal by reference.

\*The total principal amount is subject to change based upon actual final closing dates, and actual costs of issuance. By presenting this bid we are accepting any changes that are necessary to the final debt service schedule once all final dates and costs are known. Changes, if any, will be circulated promptly once a bid has been accepted. The total principal amount, however, will not exceed \$3,665,000.

\*\*If we choose to have the Bonds issued as one term Bond (with only one CUSIP number; but still following the annual principal repayment structure with a mandatory sinking fund) we understand that only ONE flat interest rate can be assigned to all maturities.

Bidders Comments, if any: \_\_\_\_\_

\_\_\_\_\_  
Bidding Institution Name & City

\_\_\_\_\_  
Taxpayer ID of Institution

\_\_\_\_\_  
Authorized Signature of Bidder

\_\_\_\_\_  
E-mail Address of Bidder

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

\_\_\_\_\_  
Written Name & Title

The foregoing offer is hereby accepted by and on behalf of the Board of Directors of the Linn-Mar Community School District, Iowa, in the County of Linn, State of Iowa, this 6<sup>th</sup> day of October, 2014.

ATTEST:

\_\_\_\_\_  
Board President

\_\_\_\_\_  
Board Secretary

## FINANCIAL SERVICES AGREEMENT

This Financial Services Agreement, (the “Agreement”) is entered into the \_\_\_\_ day of \_\_\_\_\_ 2014, by and between Linn-Mar Community School District (the “Issuer”), and Piper Jaffray & Co. (the “Financial Services Provider”).

### RECITALS

WHEREAS, the Issuer requires the provision of financial services in connection with the issuance by the Issuer of approximately \$3,665,000 Tax-Exempt School Infrastructure Sales, Services & Use Tax Revenue Bonds (the “Project”); and

WHEREAS, the Issuer desires to engage the Financial Services Provider to render the services; and

WHEREAS, the Issuer has selected Ahlers & Cooney P.C. as bond counsel (“Bond Counsel”) and has not relied on Financial Services Provider for any assistance selecting Bond Counsel, Financial Services Provider is not party to the engagement agreement between Issuer and Bond Counsel, including having a working knowledge of any limitations under said agreement; and Financial Services Provider shall assume no responsibility for the work or opinions provided by Bond Counsel.

NOW THEREFORE, in consideration of the mutual covenants and stipulations hereinafter set forth, the parties agree as follows:

**Section 1. Scope of Services** The Scope of Services shall include assistance in the following areas with respect to each Project or Projects identified in a Project Amendment.

#### Debt Security Services

##### The Financial Services Provider shall:

- a) Develop a Plan of Finance for the Project which is attached as Exhibit A and is incorporated by reference.
- b) As requested by the Issuer, provide alternative debt retirement schedules
- c) Comment on the value and recommend as to the use of credit ratings; coordinate the process securing credit rating, if necessary
- d) Propose bond terms for the securities being sold
- e) Develop a timeline with respect to the issuance of proposed securities
- f) Develop the initial form of the Issuer’s Bid Package and Term Sheet, including the Official Bid Form; share the form with the Issuer and its bond and disclosure counsel (if any), for the Issuer’s input and modification to reflect the particular disclosure requirements for this Issuer and this type of security.
- g) Evaluate and recommend the bids received to the Board for consideration
- h) Coordinate the closing of the transaction

##### The Issuer shall:

- i) Approve or disapprove of the Plan of Finance
- j) Review the Bid Package and Term Sheet, including the Official Bid Form and provide information that cannot be sourced from other third parties. After review of the Bid Package and Term Sheet, including the Official Bid Form, the Issuer shall provide certification that to the best of the Issuer’s knowledge, information, and belief, the Bid Package and Term Sheet, including the Official Bid Form, as of its date, does not contain any untrue statement of a material fact or omit to state a material fact necessary in order to make the statements made, in the light of the circumstances under which they were made, not misleading.

- k) Participate in all calls, discussions and requests for information necessary to complete the credit rating process, if a rating is recommended as discussed herein
- l) Subject to the Plan of Finance, take all usual and customary steps necessary to complete the Project,

Both the Issuer and Financial Services Provider acknowledge that a timeline for the Project has been circulated and is acceptable to both parties.

#### Extent of Duties Arising under this Agreement

The Issuer and the Financial Services Provider intend and agree that, to the extent the performance of services by the Financial Services Provider with respect to a Project constitutes municipal advisory activities within the meaning of proposed rule 15Ba1 of the Securities Exchange Act of 1934 or otherwise creates a duty of the Financial Services Provider under Section 15B(c)(1) of the Securities Exchange Act of 1934 or Rule G-23 of the Municipal Securities Rulemaking Board, such duty does not extend beyond the services to be provided with respect to that Project and such duty does not extend to any other contract, agreement, relationship, or understanding of any nature between the Issuer and the Financial Services Provider.

#### Section 2. Compensation.

Debt Security Services: 0.35% of the par amount, with a minimum of \$14,500 and maximum of \$25,000 [So long as the principal amount does not exceed \$3,665,000 the fee would be calculated as \$14,500.]

Section 3. Expenses. The Issuer will reimburse the Financial Services Provider in addition to the fees outlined in Section 2 for the preparation, printing and mailing costs associated with the official statement, and any other related costs, for the Project to be implemented as contemplated herein at a cost of \$2,500 only if a traditional public sale is eventually required; no such added cost for a direct placement with an area bank. The Financial Services Provider will be responsible for all of the Financial Services Provider's out-of-pocket expenses, including communication, cost of financial analysis and reports prepared in fulfilling its duties outlined herein. If attendance at more than 1 meeting of the Issuer's board is required (after September 2, 2014), the Issuer shall reimburse the Financial Services Provider at the rate of \$200 per hour, and the hours shall be counted including travel time, and reasonable time allocations for meals. If out-of-state travel is directed by the Issuer, the Issuer will reimburse the Financial Services Provider for those expenses. The Issuer will be responsible for the payment of all fees and expenses commonly known as Costs of Issuance, including but not limited to: CUSIP numbers, publication expenses, local legal counsel, bond counsel, ratings, credit enhancement, travel associated with securing any rating or credit enhancement, printing of bonds, printing and distribution of required disclosure documents, trustee fees, paying agent fees, CUSIP registration, and the like, if necessary.

Section 4. Term of Agreement. The term of this Agreement shall begin on the date of execution set forth above or on the date of any amendment hereto respecting a Project and shall terminate on completion of the Project.

The Issuer or the Financial Services Provider may terminate this Agreement at any time on written notice to the other party and all fees due to the Financial Services Provider shall be due and payable upon termination by the Issuer. Should this Agreement contemplate multiple Projects, unless earlier terminated, the obligations of the Financial Services Provider with respect to any Project shall terminate immediately upon the closing or settlement of securities issued to finance the Project and the Financial Services Provider shall thereafter have no continuing fiduciary or other duties to the Issuer under this Agreement and specifically the Project Amendment to this Agreement in connection with that Project. The provisions of Sections 3, 10, 11, 14 and 15 shall survive termination of this Agreement.

**Section 5. Independent Contractor.** The Financial Services Provider is an independent contractor and nothing herein contained shall constitute or designate the Financial Services Provider or any of its employees or agents as employees or agents of the Issuer.

**Section 6. Assignment.** Neither the Financial Services Provider nor the Issuer shall have the right or power to assign this Agreement or parts thereof, or its respective duties, without the express written consent of the other party. In the event of acquisition of the Financial Services Provider by a third party firm, notice shall be given to the Issuer regarding the acquisition and the Issuer shall have the opportunity to consent to the assignment of this Agreement, which consent shall not be unreasonably withheld.

**Section 7. Entire Agreement/Amendments.** This Agreement, including any amendments hereto which are expressly incorporated herein, constitute the entire Agreement between the parties hereto and sets forth the rights, duties, and obligations of each to the other as of this date. Any prior agreements, promises, negotiations, or representations not expressly set forth in this Agreement are of no force and effect. This Agreement may not be modified except by a writing executed by both the Financial Services Provider and the Issuer.

**Section 8. Not Liable for Advice of Third Party Financial Services Providers.** Should the Issuer seek advice from third party Financial Services Providers, bankers or legal advisors or others providing guidance similar in scope to that contemplated herein, the Issuer agrees that the Financial Services Provider shall not be held liable for advice or recommendations made to the Issuer by third party Financial Services Providers, banker or legal advisors.

**Section 9. Legal Advice.** The Financial Services Provider is not legal counsel or an accountant and is not providing legal or accounting guidance. None of the Services contemplated in this Agreement shall be construed as or a substitute for legal services.

**Section 10. Indemnification.** To the extent the Issuer is authorized by law to indemnify the Financial Services Provider, the Issuer will indemnify and hold harmless the Financial Services Provider, each individual, corporation, partnership, trust, association or other entity controlling the Financial Services Provider, any affiliate of the Financial Services Provider or any such controlling entity and their respective directors, officers, employees, partners, incorporators, shareholders, servants, trustees and agents (hereinafter the "Indemnitees") against any and all liabilities, penalties, suits, causes of action, losses, damages, claims, costs and expenses (including, without limitation, fees and disbursements of counsel) or judgments of whatever kind or nature (each a "Claim"), imposed upon, incurred by or asserted against the Indemnitees arising out of or based upon the Issuer's gross negligence or wilfull acts, errors or omissions in the performance of its obligations under this Agreement or any other resolution, document or covenant with respect to the Bonds issued by the Issuer as contemplated herein.

To the extent the Issuer is authorized by law to indemnify the Financial Services Provider, the Financial Services Provider will indemnify and hold harmless the Issuer, each individual, corporation, partnership, trust, association or other entity controlling the Issuer, any affiliate of the Issuer or any such controlling entity and their respective directors, officers, employees, partners, incorporators, shareholders, servants, trustees and agents (hereinafter the "Indemnitees") against any and all liabilities, penalties, suits, causes of action, losses, damages, claims, costs and expenses (including, without limitation, fees and disbursements of counsel) or judgments of whatever kind or nature (each a "Claim"), imposed upon, incurred by or asserted against the Indemnitees arising out of or based upon the Financial Services Providers gross negligence or wilfull acts, errors or omissions in the performance of its services under this Agreement.

The Issuer acknowledges and understands that state and federal laws relating to disclosure in connection with municipal securities, including but not limited to the Securities Act of 1933 and Rule 10b-5 promulgated under the Securities Exchange Act of 1934, may apply to the Issuer.

**Section 11. Notices.** Any written notice or communications required or permitted by this Agreement or by law to be served on, given to, or delivered to either party hereto, by the other party shall be in writing and shall be deemed duly served, given, or delivered when personally delivered to the party to whom it is addressed or in lieu of such personal services, when deposited in the United States' mail, first-class postage prepaid, addressed to the Issuer at:

Linn-Mar Community School District  
Attn: Board Secretary  
2999 N 10<sup>th</sup> Street  
Marion, IA 52302

or to the Financial Services Provider at:

Piper Jaffray & Co.  
Attention Public Finance Department  
3900 Ingersoll Ave. Suite 110  
Des Moines, IA 50312

**Section 12. Consent to Jurisdiction; Service of Process.** This Agreement shall be deemed to have been executed in the State of Iowa, and the laws of the State of Iowa govern the construction of this Agreement and the rights and remedies of the respective parties hereto. Any litigation arising between the parties related in any way to this Agreement shall be initiated and maintained only in the U.S. District Court for the Southern District of Iowa.

**Section 13. Counterparts; Severability.** This Agreement may be executed in two or more separate counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. Any term or provision of this Agreement which is invalid or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such invalidity or unenforceability without rendering invalid or unenforceable the remaining terms and provisions of this Agreement or affecting the validity or enforceability of any of the terms or provisions of this Agreement in any other jurisdiction.

**Section 14. Parties in Interest.** This Agreement, including rights to indemnity and contribution hereunder, shall be binding upon and inure solely to the benefit of each party hereto, any Indemnitee and their respective successors, heirs and assigns, and nothing in this Agreement, express or implied, is intended to or shall confer upon any other person any right, benefit or remedy of any nature whatsoever under or by reason of this Agreement.

**Section 15. Waiver of Jury Trial.** The parties each hereby agree to waive any right to a trial by jury with respect to any claim, counterclaim or action arising out of or in connection with this agreement or the transactions contemplated hereby.

**Section 16. Issuer intends to issue Tax Exempt Bonds.** The Issuer acknowledges it intends to issue the Bonds on a tax exempt basis and further acknowledges the Issuer's continuing covenants and responsibilities regarding tax exemption that will be contained in the Bond Documents, including the Tax Exemption Certificate and Bond Resolution. Issuer acknowledges that the services provided by the Financial Services Provider are not intended to be construed as tax advice with respect to the issuance of the Bonds.

**Section 17. General.** The failure of either of the parties to enforce any right or provision under this Agreement shall not constitute a waiver of such right or provision unless acknowledged and agreed to by such party in writing. No waiver shall be implied from a failure of either party to exercise a right or remedy. In addition, no waiver of a party's right or remedy will affect the other provisions of this Agreement.

The captions in this Agreement are included for convenience of reference only and are in no way meant to define or limit any of the provisions contained in this Agreement or otherwise affect their construction or effect. When a word or phrase is enclosed in parenthesis and quotation marks, i.e., ("Word"), then that word or phrase shall be interpreted as if fully written out in the following format: "(hereinafter referred to as the 'Word')," and thereafter in this Agreement, that word or phrase shall stand as an abbreviation of the longer phrase to which it relates.

IN WITNESS WHEREOF, the parties have executed this Agreement on the date first above written. By the signature of its representative below, each party affirms (a) that it has taken all necessary action to authorize said representative to execute this Agreement, and (b) that it has read the attached DISCLOSURE OF CONFLICTS OF INTEREST WITH VARIOUS FORMS OF COMPENSATION, and has asked any questions or sought any clarification about the disclosure, with no further questions about said disclosure.

LINN-MAR COMMUNITY SCHOOL DISTRICT, IOWA

By: \_\_\_\_\_  
Title: Board President

PIPER JAFFRAY & CO.

By: \_\_\_\_\_  
Matthew R. Gillaspie  
Senior Vice President



## DISCLOSURE OF CONFLICTS OF INTEREST WITH VARIOUS FORMS OF COMPENSATION

The Municipal Securities Rulemaking Board (MSRB) requires us, as your municipal advisor, to provide written disclosure to you about the actual or potential conflicts of interest presented by various forms of compensation. We must provide this disclosure even if you have already chosen a particular form of compensation. The municipal advisor's client should select a form of compensation that best meets its needs and the agreed upon scope of services.

Forms of Compensation; Potential Conflicts. The forms of compensation for municipal advisors vary according to the nature of the engagement and requirements of the client, among other factors. Various forms of compensation present actual or potential conflicts of interest because they may create an incentive for an advisor to recommend one course of action over another if it is more beneficial to the advisor to do so. This document discusses various forms of compensation and the timing of payments to the advisor.

Fixed fee. Under a fixed fee form of compensation, the municipal advisor is paid a fixed amount established at the outset of the transaction. The amount is usually based upon an analysis by the client and the advisor of, among other things, the expected duration and complexity of the transaction and the agreed-upon scope of work that the advisor will perform. This form of compensation presents a potential conflict of interest because, if the transaction requires more work than originally contemplated, the advisor may suffer a loss. Thus, the advisor may recommend less time-consuming alternatives, or fail to do a thorough analysis of alternatives. There may be additional conflicts of interest if the municipal advisor's fee is contingent upon the successful completion of a financing, as described below.

Hourly fee. Under an hourly fee form of compensation, the municipal advisor is paid an amount equal to the number of hours worked by the advisor times an agreed-upon hourly billing rate. This form of compensation presents a potential conflict of interest if the client and the advisor do not agree on a reasonable maximum amount at the outset of the engagement, because the advisor does not have a financial incentive to recommend alternatives that would result in fewer hours worked. In some cases, an hourly fee may be applied against a retainer (e.g., a retainer payable monthly), in which case it is payable whether or not a financing closes. Alternatively, it may be contingent upon the successful completion of a financing, in which case there may be additional conflicts of interest, as described below.

Fee contingent upon the completion of a financing or other transaction. Under a contingent fee form of compensation, payment of an advisor's fee is dependent upon the successful completion of a financing or other transaction. Although this form of compensation may be customary for the client, it presents a conflict because the advisor may have an incentive to recommend unnecessary financings or financings that are disadvantageous to the client. For example, when facts or circumstances arise that could cause the financing or other transaction to be delayed or fail to close, an advisor may have an incentive to discourage a full consideration of such facts and circumstances, or to discourage consideration of alternatives that may result in the cancellation of the financing or other transaction.

Fee paid under a retainer agreement. Under a retainer agreement, fees are paid to a municipal advisor periodically (e.g., monthly) and are not contingent upon the completion of a financing or other transaction. Fees paid under a retainer agreement may be calculated on a fixed fee basis (e.g., a fixed fee per month regardless of the number of hours worked) or an hourly basis (e.g., a minimum monthly payment, with additional amounts payable if a certain number of hours worked is exceeded). A retainer agreement does not present the conflicts associated with a contingent fee arrangement (described above).

Fee based upon principal or notional amount and term of transaction. Under this form of compensation, the municipal advisor's fee is based upon a percentage of the principal amount of an issue of securities (e.g., bonds) or, in the case of a derivative, the present value of or notional amount and term of the derivative. This form of compensation presents a conflict of interest because the advisor may have an incentive to advise the client to increase the size of the securities issue or modify the derivative for the purpose of increasing the advisor's compensation.

## **Exhibit A – Plan of Finance**

- The target of this issue is New Money, the proceeds to be used to fund various improvements, demolition, renovation and construction at the High School or other campus buildings within the District.
- The issue is approximately \$3,665,000 in size, and thus will be designated bank qualified by the Issuer.
- It is NOT expected that a debt service reserve fund will be funded for this issue.
- Pay all issuance costs associated with the Bond (including but not limited to legal, financial advisory, rating, underwriting, printing & miscellaneous costs) out of the proceeds of the Bonds at closing, or substantially thereafter.
- Bond pricing shall be on September 30<sup>th</sup> or another date as mutually agreeable between legal counsel, the issuer and the Financial Services Provider. The Bond shall close on or around October 21<sup>st</sup>.
- The Issuer shall approve the preliminary offering documents at its September 8<sup>th</sup> board meeting.
- It is NOT anticipated that a credit rating from Standard & Poor's Corporation will be requested.
- It is anticipated that the Bonds will be sold through a direct placement with an area financial institution

# Linn-Mar Community School District



Approx. \$3,665,000 School Infrastructure Sales, Services & Use Tax Revenue Bonds  
[Initially Proposed to Be Directly Placed with an Area or Non-Area Financial Institution]

## Proposed 2014 Timetable

\*Monday, September 8<sup>th</sup>      Board executed Financial Services Agreement with Piper Jaffray  
Board approves distribution of Term Sheet by Administration

*IF A BOND RATING IS BELIEVED TO BE NECESSARY THIS PROCESS MAY HAVE TO BE STRETCHED OUT  
OVER A SLIGHTLY LONGER PERIOD OF TIME. TO BE DETERMINED.*

Between 9/8 & 9/17      J.T. Anderson delivers Bid Package and other requested information to "Banks" for consideration prior to expected bidding on September 30<sup>th</sup>. *(Any questions from the banks are routed through J.T. to Piper Jaffray instead of directly to Piper Jaffray as Piper will be acting as the Financial Advisor to the District with a fiduciary duty to the District and cannot be seen as soliciting or playing any favored role to any particular institution).*

Tuesday, September 30<sup>th</sup>      Banks provide bid details to District by 1:00PM. Piper Jaffray reviews bids and calculates Lowest/Best bid. Piper prepares summary for Board, with recommendation letter, and provides final details to Ahlers & Cooney for document preparation in advance of October 6<sup>th</sup> meeting.

\*Monday, October 6<sup>th</sup>      Board adopts various bond issuance resolutions/paperwork/etc. provided by Ahlers & Cooney

Tuesday, October 21<sup>st</sup>      Transaction closes. Bond proceeds are delivered to District's bank of choice for investment during construction process.

### \* Board Action Dates

# FACILITY USE AGREEMENT



Facility Name:	<b>U.S. CELLULAR CENTER ARENA</b>
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## LINN MAR MARION GRADUATION

**MAY 24, 2015**

This Agreement, entered into this 3rd day of September, 2015 by and between the U.S. Cellular Center Arena, managed by VenuWorks of Cedar Rapids, LLC, an independent contractor retained by the City of Cedar Rapids, Iowa (**OWNER**) to manage the **U.S. Cellular Center Arena**, hereinafter referred to as "**ARENA**" and:

## LINN MAR COMMUNITY SCHOOLS

**ATTN: MARK HUTCHESON**

**3111 No 10<sup>th</sup> Street**

**Marion, IA. 52392**

**Phone: 319-447-3042**

● **Fax**

● **E-Mail** [mhutcheson@linnmar.k12.ia.us](mailto:mhutcheson@linnmar.k12.ia.us)

Hereinafter referred to as "**CLIENT**."

### DEFINITIONS

**Addendums** shall mean all documents incorporated as part of this Agreement.

**ARENA** shall mean the duly appointed manager of the U.S. Cellular Center, VenuWorks of Cedar Rapids, LLC, Cedar Rapids, Iowa. Phone: 319-398-5211, Fax: 319-362-2102.

**Concessions** shall mean the sale of food, beverages and souvenir or novelty items through concession points of sale, either fixed or portable, to Event attendees.

**Event** means the Linn Mar and Marion Graduation and all related activities.

**Gross Ticket Sales** means the total ticket sales less any applicable federal, state and local admission taxes and facility fee, when applicable.

**Term** means the period of this Agreement as set forth below under "term".

### SCOPE OF USE

**CLIENT** warrants that said use is for the following and no other purpose: **Linn Mar and Marion Graduations**

Spaces utilized for the above stated purpose will be as follows:

U.S. Cellular Center Arena and all contiguous spaces not including the hotel or convention center.

Client Initials \_\_\_\_\_ Date \_\_\_\_\_

Facility Initials \_\_\_\_\_ Date \_\_\_\_\_

# FACILITY USE AGREEMENT



## **TERM**

The Term shall commence on Sunday, May 24, 2015  
Event day(s) are Sunday, May 24, 2015  
Move-in and Move-out days are: Sunday, May 24, 2015 1:00 p.m. and 6:00 pm  
Move out is immediately following event.

## **PAYMENT**

In consideration for the license to use the ARENA as provided in this Agreement, CLIENT shall pay to **ARENA** a facility rental fee of \$3,000.00, plus the cost of ushers, ticket scanners, crowd control, police, fire, guest event medical, cleaning, conversion, ticket sellers.

**CLIENT** also agrees to pay all reimbursable expenses required for the completion of this Event including advertising, stagehand, catering and outside rentals.

## **SECURITY DEPOSIT**

As partial consideration for the execution of this license Agreement, the CLIENT shall pay the **ARENA** a **NON-REFUNDABLE** security deposit of \$2500.00 which shall be due upon execution of this Agreement.

## **ADDITIONAL DEPOSIT PAYMENTS**

It is expressly understood that **ARENA** prior to CLIENT'S Event, may require additional deposit payment(s) to satisfy CLIENT'S obligations under this Agreement. If CLIENT fails to meet this requirement, **ARENA**, at its sole option, may terminate this Agreement, and CLIENT shall forfeit, as liquidated damages, the Security Deposit as set forth above.

Make checks payable to: U.S. Cellular Center  
370 1<sup>st</sup> Ave NE  
Cedar Rapids, IA. 52401

## **BOX OFFICE SERVICES**

**ARENA** provides comprehensive box office services for ticketed events through the Ticketmaster system. Prior to making any public announcements, **CLIENT** must contact the Box Office Manager to make all arrangements for setting the event up on the Ticketmaster system, ticket pricing, discounts, pre-sale and public on sale dates.

## **BOX OFFICE CHARGES**

**CLIENT** shall pay the greater of \$0 for box office services and ticket printing. A \$0 set-up and ticket fee will be charged for each additional performance.

Client Initials \_\_\_\_\_ Date \_\_\_\_\_

Facility Initials \_\_\_\_\_ Date \_\_\_\_\_

# FACILITY USE AGREEMENT



## **TAXES AND SURCHARGES**

The tickets sold will bear the following taxes and surcharges:

6% State of Iowa Sales Tax  
1% City of Cedar Rapids Sales Tax  
7% Total Sales Tax

CLIENT agrees that VIP boxes in the ARENA are not manifested for the opening performance covered by this Agreement.

It is agreed that the on-sale date for this Event covered by this Agreement will be TBA.

Upon **CLIENT** request and upon receipt of specific event information supplied by **CLIENT**, **ARENA** will provide an event cost estimate. This cost estimate is a good faith attempt to identify event costs. However, an event cost estimate is not a price quotation, and **CLIENT** is responsible to **ARENA** for full payment of the actual costs billed to the event.

## **NOVELTIES AND CONCESSIONS**

**ARENA** retains 100% exclusive rights to sell program books, novelties, and souvenirs which directly relate to event.

ARENA will receive 20% after tax for all novelties sales. All revenues net of payment of the commission shall belong to CLIENT. ARENA will provide and pay for ARENA's sellers.

The **ARENA** reserves the right to operate and receive the income from concessions sold at the Event. Such concessions shall include, but not be limited to, the dispensing or sale of food and beverages.

## **INSURANCE REQUIREMENTS AND CLIENT'S INDEMNIFICATION.**

**CLIENT** must be named as the Insured on all Certificates of Insurance provided to **ARENA**.

**CLIENT** shall for the term of this Agreement, including move-in, rehearsals and move-out, shall have and maintain in full force and effect a policy or policies of **General Liability Insurance**, (including, but not limited to, coverage for Fire, Legal Liability, Products/Completed Operations, Contractual Liability for obligations assumed under this Agreement, and for liability arising out of the operation of Subcontractors) and of **Automobile Liability** (including, but not limited to, coverage for liability arising out of Owned, Non-Owned, and Hired vehicles) in such form as will provide complete coverage and protection from and against claims, actions or lawsuits for damages because of bodily injury and/or death to any person; and from and against claims, actions or lawsuits for damages to property, any and all of which may or might arise out of or result from the **CLIENT'S** operations or occupancy under this Agreement, whether such operations be by **CLIENT** or by any subcontractor of anyone else directly or indirectly employed or hired by either of them. Policy shall be written with a bona fide ADMITTED insurance company licensed to do business in the state of Iowa and shall not be a SURPLUS LINES COMPANY. The company must have a **BEST** rating greater than **A- VII** (7).

**CLIENT** further agrees to make certain that the aforementioned liability insurance policy or policies which it procures and maintains in compliance with the requirements of this Agreement shall be separately and specifically endorsed so as to provide that the City of Cedar Rapids, DBA Doubletree by Hilton Cedar Rapids Convention Complex, VenuWorks of Cedar Rapids, LLC, **VenuWorks, Inc.**; their parents, subsidiaries, affiliates, directors, officers, employees, insurers, and agents herein, is an **Additional Insured** as to all Comprehensive General Liability, Comprehensive Automobile Liability, and Umbrella Excess Liability insurance coverage provided under such policy or policies, and further agrees that such insurance as is designated hereunder shall be written for not less than the following limits of liability:

Client Initials \_\_\_\_\_ Date \_\_\_\_\_

Facility Initials \_\_\_\_\_ Date \_\_\_\_\_

# FACILITY USE AGREEMENT



## **Comprehensive General Liability:**

\$2,000,000 combined single limit Bodily Injury & Property Damage or equivalent per occurrence and in the aggregate.

## **Comprehensive Automobile Liability:**

\$1,000,000 combined single limit Bodily Injury & Property Damage or equivalent per occurrence.

## **Worker's Compensation:**

**CLIENT** further agrees to have and maintain in full force and effect during its occupancy under this Agreement a policy or policies of worker's compensation and employer's liability insurance which provide it with complete coverage and protection from and against claims, actions or lawsuits brought under or pursuant to worker's compensation, employer's liability or other employee benefits acts. Such insurance shall be in the amounts required by statutory worker's compensation requirements and employer's liability limits of one million dollars (\$1,000,000.00). Worker's Compensation coverage must include employees, subcontractors and volunteers.

Such policies shall further be endorsed so as to provide a **thirty (30)** day written notice of cancellation to **ARENA**, and **CLIENT** shall secure and provide **ARENA** with a Certificate of Insurance on a form approved by **ARENA**, which shall demonstrate compliance by **CLIENT** with these insurance requirements.

The **CLIENT** shall defend, indemnify and hold harmless the **ARENA** and its agents and employees from and against all claims, damages, losses and expenses, including attorneys' fees arising out of or resulting from the acts, errors, omissions, conduct or operations of the **CLIENT**, provided that any such claim, damage, loss or expense (1) is attributable to bodily injury, sickness, disease or death or to injury to or destruction of tangible property, including the loss of use resulting therefrom, and (2) is caused or is claimed or alleged to have been caused, in whole or in part, by negligent act, error, omission, conduct or operation of the **CLIENT**, or any subcontractor, or anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, or (3) is abused or is claimed to have been caused, in whole or in part, by any product sold or service rendered by the **CLIENT**, its agents, employees, or subcontractors.

In any and all claims against the **ARENA** or any of its agents or employees by any employee of the **CLIENT**, any subcontractor, anyone directly or indirectly employed for whose acts any of them may be liable, this indemnification obligation shall not be limited in any way by the limitations on the amount or type of damages, compensation or benefits payable by or for the **CLIENT** or any subcontractor under Workman's Compensation Acts, Disability Benefit Acts, or other Employee Benefits Acts.

The **ARENA** and **CLIENT** hereby waive all rights against each other for any loss or damage caused by fire, extended coverage perils and vandalism, and which loss or damage is covered and compensated by insurance.

A Certificate of Insurance form indicating the coverage noted above must be completed and delivered to the **ARENA** not later than the earlier of Ticket On-Sale date or thirty (30) days prior to the date of initial occupancy hereunder or **CLIENT** shall forfeit its rights under this Agreement.

## **PLACE OF SUIT/CHOICE OF LAW**

This Agreement is executed in the City of Cedar Rapids, State of Iowa, and shall be governed by, construed and enforced in accordance with the laws of the State of Iowa. Any action at law, suit in equity, or other judicial proceedings for the enforcement of the Agreement or any provision thereof shall be instituted in any court of competent jurisdiction in the County of Linn, State of Iowa.

Client Initials \_\_\_\_\_ Date \_\_\_\_\_

Facility Initials \_\_\_\_\_ Date \_\_\_\_\_

# FACILITY USE AGREEMENT



## ADDITIONAL COVENANTS AND AGREEMENTS

All conditions and regulations set forth on the attached documents are hereby incorporated as a part of this Agreement.

For **ARENA:**

By \_\_\_\_\_

Print Name: Sharon Cummins  
Executive Director  
Regional Vice President

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

For **CLIENT:**

By \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Federal Tax ID # \_\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Client Initials \_\_\_\_\_ Date \_\_\_\_\_

Facility Initials \_\_\_\_\_ Date \_\_\_\_\_



## ADDITIONAL INSURED LANGUAGE



Facility  
Name:

**U.S. CELLULAR CENTER**

(See Procedure EVM014)

### CERTIFICATE OF INSURANCE

U.S. Cellular Center, its agents, officers and employees, VenuWorks of Cedar Rapids, L.L.C., VenuWorks, Inc. and The City of Cedar Rapids, DBA Doubletree by Hilton Cedar Rapids Convention Complex, and VenuWorks, Inc. and its employees, solely with respect to the premises rented to the named insured for the purpose of promoting "**Linn Mar Marion Graduation**" at the U.S. Cellular Center on May 24, 2015.

### OTHER MANDATED INSURANCE PROVISIONS

- Only insurance companies that are licensed as an admitted carrier in the State of Iowa will be acceptable. They must be rated in the current "Best" key rating guide with an "A-VI" rating or better.
- All insurance policies shall evidence primary coverage and shall not be contributory to any other policy.
- The legal entity entering into the Facility Use Agreement must be identified as a named insured on the insurance certificate.
- The Client must provide evidence of workers compensation coverage.
- Insurance coverages must name the venue and the additional insureds listed above as additional insureds.
- The venue shall be the certificate holder.
- The Client's property in the building is the responsibility of the Client. The venue, VenuWorks, the City of Cedar Rapids, DBA Doubletree by Hilton Cedar Rapids Convention Complex, etc. will not insure the Client's property.
- All coverages are required. Example: The Client is not excused from providing auto liability coverage just because they don't plan to use any vehicles.
- Minimum acceptable Limits of Liability are as follows:

**Auto**

Owned, non-owned and leased autos - \$1,000,000.

**Liability**

All policies must be written on a per occurrence basis as indicated as such on the certificate of insurance. All policies must be written with a limit of not less than \$2,000,000 per occurrence and \$2,000,000 in aggregate. An umbrella policy may be used to achieve these limits of coverage. (Essentially, this means that two separate insurance policies may be used as long as the aggregate limits of coverage are delivered.)

**Workers Comp**

As evidenced or where limits are directed by the State if it is one of those States that are monopolistic with regard to workers compensation.



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Strategic Goal 1	Strategic Goal 2	Strategic Goal 3	Strategic Goal 4	Strategic Goal 5
<b>Student Achievement:</b> <i>All action on teaching and learning will focus on empowering achievement at the highest level for each student.</i>	<b>Learning Environments:</b> <i>All buildings and facilities will support the learning and teaching needed to unlock the potential in each student.</i>	<b>Staff Development:</b> <i>All staff will learn, perform and lead in such a manner as to inspire learning for students.</i>	<b>Community Engagement:</b> <i>The entire school community will engage the families, residents and stakeholders for the purpose of increasing opportunities for students.</i>	<b>Resources:</b> <i>All resources, real and potential, will be planned, and allocated in the spirit of providing an exciting and secure future for the students and District.</i>

**LINN-MAR COMMUNITY SCHOOL DISTRICT  
BOARD OF EDUCATION - WORK SESSION MINUTES  
August 25, 2014 @ 5:00 PM**

**ATTENDEES:**

- **Board:** Buchholz, Patterson, Hutcheson, Wilson, Stark, Gadelha, Isenberg
- **Administration:** Mulholland, Morrison, Anderson, Ramos, Ironside, Jensen, Christian
- **Absent:** Halupnik
- **Guest:** Dr. Ted Blaesing, Consultant with HYA Executive Search

**CALL TO ORDER AND DETERMINATION OF A QUORUM:**

The Linn-Mar Community School District Board of Directors work session was called to order in the Linn-Mar Board Room of the Learning Resource Center (LRC) by Buchholz at 5:00 PM. Roll was taken and it was determined a quorum was present for the meeting.

**REVISION AND/OR ADOPTION OF THE AGENDA: Motion 026-08-25**

Motion by Patterson that the Board adopt the work session agenda as presented. Second by Gadelha. Voice vote. Motion unanimously approved.

**WORK SESSION DISCUSSION/INFORMATION:** Discussion led by Dr. Ted Blaesing, HYA Executive Search

- **Board & Focus Group Interviews:** Blaesing will spend two days interviewing the Board members as well as the focus groups regarding the superintendent search. Will ask three specific questions:
  - What do you consider the Points of Pride to be in the District?
  - What issues/concerns do you believe the District needs to confront?
  - What attributes do you believe are important in the next superintendent?
- **Interview Dates:** Thursday, September 4<sup>th</sup> and Friday, September 5<sup>th</sup> – Board members do not need to be present during the Focus Group interviews. Board members should contact Jessi Pfaff to set up their individual interviews.
- **Focus Group Interviews:** There are 32 interview time slots; 8 of which will be taken by Board members and Mulholland. That leaves spots for 24 Focus Group interviews. Stark asked what the preference was for size of Focus Groups. Blaesing clarified that six to seven people is ideal for all voices to be heard; but that he can facilitate larger groups. Focus Group sessions will be 45 minutes to an hour in length.
- **Online Survey:** Blaesing stated that an online survey would represent a Focus Group and would be accessible via the District website. The online survey will require the participant to choose

eight characteristics they would like to see in the next superintendent. Blaesing stated that the online survey would be advertised via the District communications director, newspapers, email blitzes, word of mouth, etc. A hard copy of the survey will be available through the District office for those who do not have Internet access. Board members should complete a paper copy of the online survey prior to their individual interviews. Jensen will speak with ELL coordinator to determine the need to provide the survey in multiple languages.

- Determination of Focus Group Participants: Blaesing had each Board member list two groups that they believed should be represented in a Focus Group:
  - Isenberg: district administrators (Cabinet & Teaching and Learning) and former Board members
  - Gadelha: Fundraisers (PTO/Foundation/Boosters) and reps from Board advisory groups
  - Stark: LMEA and open forum for certified teachers. Recommended a smaller group of teachers as well with each building picking 1-2 representatives.
  - Buchholz: Principals and government leaders (City, County, State)
  - Patterson: Students (2 groups: student leaders and random) and higher education leaders (Coe, Regents, Kirkwood, Mt Mercy)
  - Hutcheson: Mulholland, business leaders (employers, CR Metro Economics Group), district activity leaders (performing arts, sports, etc.) and faith community
  - Wilson: Special Education Advisory and support staff/union leadership
  - Blaesing suggested an open community forum – will be held on September 4<sup>th</sup> from 7:00-8:00 PM in the high school auditorium. Jessi Pfaff will reserve the space.
- Assignments for Submitting Focus Group Names: Board members should supply Jessi Pfaff with a list of names for each group they suggested by 9:00 AM on Tuesday, August 26<sup>th</sup>.
  1. District Administrators: District Office
  2. Former Board Members: District Office
  3. Fundraisers (PTO/Foundation/Boosters): Wilson
  4. Reps from Board Advisory Groups: Gadelha and District Office
  5. LMEA: District Office
  6. Teacher Building Reps: Principals (4 names from HS and 2 from other buildings)
  7. Principals: District Office
  8. Government Leaders: Buchholz
  9. Students (2 groups – leaders and random): Principals and District office (4 names from HS and 2 from other buildings)
  10. Higher Education: Patterson and Mulholland
  11. Business Leaders: Hutcheson and Mulholland
  12. District Activity Leaders: District office
  13. Faith Community: Isenberg and each Board member suggest 2
  14. Special Education Advisory: District office (Julie Jensen)
  15. Support Staff/Union: District office (Karla Christian)
  16. Volunteer Coordinators: District office (Karla Terry)
- Ideas on how to invite Focus Group members: Blaesing shared that personal invitations receive a better response and that Board should over invite to ensure enough people are able to share

their voice in the process. Blaesing also shared that follow up reminders just prior to the meetings are useful as well.

- Tentative Timeline:
  - August 27<sup>th</sup>: Online survey opens. Will close at midnight on Sunday, September 7<sup>th</sup>
  - Sept 4-5: Board interviews and Focus Groups
  - September 15<sup>th</sup>: Blaesing presents leadership profile report to Board at 5:15 PM @ LRC. Will share the breakdown of characteristics shared by each Focus Group.
  - November 10<sup>th</sup>: Seminar for interviews and final stages of search / initial slate presented
  - November 14-15: First-round interviews with top 5 candidates
  - November 15<sup>th</sup> or 17<sup>th</sup>: Board meets to identify 3 semi-finalists
  - November 19<sup>th</sup> thru 21<sup>st</sup>: Semi-finalist interviews and district visit (*Board decided not to attend IASB Conference this year so they could host interviews*)
  - November 22<sup>nd</sup>: Board meets to identify preferred candidate
  - November 22<sup>nd</sup>: Target for public announcement
- Advertisement: Blaesing recommended an advertising package that costs \$2,500 which includes the following items and the Board agreed:
  - Inclusion in two HYA print ads in their bi-monthly *Ed Week* ad
  - Online listing in *Ed Week* for length of search with showcase ad boost
  - Online listing on AASA job site for 30 days with the Spotlight and Preferred upgrades
  - Links to all major job boards
  - Online listing for state association websites
  - One print ad in state association newsletters that take print ads (if available)
- Recruitment Phase: HYA Executive Search will collect and screen the candidates, including a full background check on the final candidate. Blaesing stated an online portal will be set up for the Board members to view specifics about individual candidates. Mulholland will check with District attorney to see if this access requires the candidates' names to be entered as public record. Hutcheson and Buchholz stated they prefer Blaesing makes recommendation for the five initial candidates. The names of the five finalists and three semi-finalists will be kept confidential to protect the candidates in their current positions. It was clarified that some candidates may not apply if the candidates' names were made public due to it jeopardizing their current positions. Blaesing did share that he has seen candidates use their interest in a position to gain a better payment package in their current position when names are shared with the public.
- Internal Candidates: Blaesing stated he likes to interview all internal candidates that apply and evaluate them the same as external candidates. The Board agreed that all internal candidates should be treated the same as external candidates in relation to confidentiality, interviews, etc.
- ♦ Salary/Fringe Benefits: Blaesing stated the Board/District should set the salary/fringe benefits package so that he has a salary range to share with candidates. Recommended the Board/District research comparable Districts, 10 largest districts in the state, and national data. Blaesing clarified that he can share comparable data instead of specific figures if the Board prefers. Buchholz, Stark, and Mulholland will meet with JT Anderson, Linn-Mar CFO, to investigate this and will share thoughts with Blaesing within the next two weeks.
- ♦ Residency Expectations: The Board shared that their first preference is for the candidate to reside within the Linn-Mar District. Blaesing will clarify this expectation with the candidates.

- ♦ Candidate Visits: The three semi-finalists will be brought in on November 19<sup>th</sup>, 20<sup>th</sup>, and 21<sup>st</sup> for final interviews with the Board and tour of district and area. Board members will act as hosts for the visits and should plan on dinner with the candidates/family followed by an interview.
- ♦ Board Liaison: Stark and Buchholz will act a co-liaisons with Blaesing, so all Board questions and concerns should be shared with Stark/Buchholz and they will be in contact with HYA.
- ♦ Additional Discussion: Isenberg requested a timelines; including list of dates, for the entire process. Blaesing stated he would send a follow up memo with this information.

**ADJOURNMENT: Motion 027-08-25**

Motion by Patterson to adjourn the Board work session at 6:43 PM. Second by Hutcheson. Voice vote. Motion unanimously approved.

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Barry Buchholz, Board President

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Angie Morrison, Board Secretary

*Respectfully submitted by:  
Gayla Burgess, Admin Asst to the Superintendent  
August 25, 2014*



Inspire Learning. **Unlock Potential. Empower Achievement.**

Strategic Goal 1	Strategic Goal 2	Strategic Goal 3	Strategic Goal 4	Strategic Goal 5
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**LINN-MAR COMMUNITY SCHOOL DISTRICT  
BOARD OF EDUCATION – REGULAR SESSION MINUTES  
August 25, 2014 @ 7:00 PM**

**ATTENDEES:**

- **Board:** Patterson, Hutcheson, Wilson, Stark, Gadelha, Isenberg
- **Administration:** Halupnik, Jensen, Anderson, Christian, Ramos, Ironside, Mulholland, Morrison
- **Absent:** Buchholz

**CALL TO ORDER AND DETERMINATION OF A QUORUM:**

The Linn-Mar Community School District Board of Directors regular session was called to order in the Linn-Mar Board Room of the Learning Resource Center (LRC) by Patterson at 7:01 PM. Roll was taken and it was determined a quorum was present for the meeting.

**REVISION AND/OR ADOPTION OF THE AGENDA: Motion 028-08-25**

Motion by Hutcheson that the Board adopt the regular session agenda as presented with the addition of the personnel walk-in exhibit. Second by Gadelha. Voice vote. Motion unanimously approved.

**AUDIENCE COMMUNICATIONS:** No items presented. Isenberg requested that at future meetings the audience be reminded to be respectful of people with their comments.

**RESOLUTIONS, OPENING BIDS, AND PUBLIC HEARINGS:** No items presented.

**RECOGNITION/PROCLAMATIONS:** No items presented.

**BOARD ANNOUNCEMENTS AND REPORTS:**

**Policy Committee Report:** Gadelha reported on the August 18<sup>th</sup> Policy Committee meeting. The committee reviewed/revised the Board Policies 400 Series. Minor changes were made to various policies to be more reflective of IASB wording and two new policies were added regarding pregnancy discrimination and background checks. Additional discussion will be held on policy 401.10, *Licensed Personnel Early Separation*, later in the meeting.

**Marion City Council Report:** Mulholland reported on the August 21<sup>st</sup> Marion City Council meeting. The meeting was short with a number of resolutions passed. There was one resolution regarding a TIF, but a closed session began immediately following so no further discussion took place with the Council members.

Coffee Conversations Report: Isenberg reported on the August 23<sup>rd</sup> Coffee Conversations meeting that was hosted at Bowman Woods Elementary so attendees could see the office renovations. Sixteen people were in attendance with a diverse group of people from elementary buildings, the High School, and community members. The conversation included questions on more foreign language options at the High School, the current priorities of the Board, concerns about the elementary class sizes; would large class sizes trigger the need for a new elementary school; and the 10-year plan including the high school renovations. The conversation also included discussion about the cost of school supplies for the families and how expensive they continue to be. The meeting lasted around two hours and was very positive. Principals and volunteers have been asked to help spread the word about this event. Mulholland thanked the Cabinet members for doing a push-out via social media to publicize the event and thanked the Board for their support of this event.

### **INFORMATIONAL REPORTS:**

#### 2014-15 Certified Staffing Report:

Karla Christian, Executive Director of Human Resources, reported on the 2014-15 certified staff hiring and clarified an updated Exhibit 701.1 that was distributed in the Board packets. There was a total of 42 new certified staff hired adding up to 232 years of experience or around 5.5 years per teacher. Since August 2013, HR has used the online application system, Applitrack, to process 3,000 applicants. This averages to around 55.6 applicants per job posting and 141 interviews; with some being combined interviews for multiple buildings. On average it has taken approximately 24 days to fill a vacant position. Technology is being used more often to process references and interviews; 162 reference checks were performed and Skype interviews were hosted. There are currently 495 teachers in the district with a grand total of 516 when the released time Teacher Leaders are included in the count. Linn-Mar currently has 1,015 employees. Christian shared thanks to the local universities that have referred graduates to the District including, but not limited to, University of Northern Iowa, Iowa State, University of Iowa, and Mt Mercy University.

#### 2014 ACT Report:

Dirk Halupnik, Deputy Superintendent, reported on the 2014 ACT results. Wilson requested clarification on why Wednesday's newspaper report stated that Linn-Mar did not share any information on the ACT results for 2014. Halupnik clarified that the person who was to deliver the information was ill, resulting in missing the print deadline.

Halupnik stated that the 2014 ACT results report on last years' seniors regarding curriculum and standards-based college readiness. In 2013 and 2014, 303 students (76%) participated in the test. Linn-Mar's composite average score in 2014 was 24.5; which is the second highest average in Linn-Mar records dating back to the late 80's and also ranks well above the state and national average. Other average scores were: English 23.6; reading 24.9; science 24.8; and math 24.4. Linn-Mar is trending upward while the state and national scores are trending downward.

Isenberg asked what percent of Linn-Mar students take the SAT. Halupnik shared that only four students participated in the SAT testing in 2014 and shared that the SAT test is college-driven, usually by schools on the eastern seaboard. Gadelha asked what percent of Linn-Mar students stay in the Midwest for higher education. Halupnik shared that it is a high percentage but that he did not have the exact figure.

Hutcheson commented it is remarkable that the state/national scores are trending downward while Linn-Mar scores are trending upward. Halupnik agreed and further shared that it is great news especially since the number of students continues to grow for Linn-Mar.

#### 2014 Advanced Placement Report:

Dirk Halupnik, Deputy Superintendent, reported on the Advanced Placement program for 2014. Iowa Law HF2679 entitled, *Senior Year Plus*, requires that every school district must offer Advanced Placement (AP) courses. Linn-Mar offered 15 AP courses in 2014; which is above average for the state of Iowa. In 2014, 743 Linn-Mar students enrolled in at least one AP courses; with exams offered in 20 different subjects. Halupnik stated that a student does not have to take an AP course to take the AP exams and that there were 581 exams administered in 2014.

Halupnik shared that the calculation for the AP Index is the number of AP exams divided by the number of graduates; which does not take into account achievement; but only the number of exams. Regarding the State AP Index, Linn-Mar is 17<sup>th</sup> out of the top 50. Linn-Mar's composite score average is 3.85 (5 being the highest score), which is the highest it has been for the District. Most colleges/universities will not accept a student unless they score 3.00 or above for college credit; but this varies by school. 83.4% of Linn-Mar students tested meet this requirement.

Gadelha asked if students are turned away because AP courses are too full. Halupnik responded that this has not occurred and sections are added as the demand grows. Hutcheson asked what determines the tests that are offered. Halupnik shared that it is based on student/parent interest and requests.

#### Teacher Leadership Report:

Debra Barry and Erin Watts, Co-Coordinator of Teacher Leadership, reported on where the program is and where they are headed; including options for assessing achievement. Teacher Leadership provides teachers with the best strategies and resources to implement in their classrooms as well utilizing collaboration time more efficiently to impact student achievement. The program has been around since the 1920's; but became better focused during the 1980's and is supported by Iowa legislators and the Governor. The timeline for writing and submitting the grant, approval of the grant, and hiring was shared. It was also shared that all positions are for one year and must be reapplied for annually. The grant is funded for three years and then rolls into the District funding structure; unless changed by further legislation.

#### Teacher Leadership Roles:

- 1) Coordinators: facilitate the team, submit grant paperwork, assess achievement, etc.
- 2) Mentor Coaches: work with year-one and year-two teachers.
- 3) Induction Specialists: work with teachers new to the district; but not new to teaching.
- 4) Model Teachers: welcome teachers into classrooms with an open-door policy for observation
- 5) Course Development Facilitators: working with TQSA to develop 3-6 courses for teachers to take for graduate or recertification credits with the hopes of developing a *Linn-Mar University*.
- 6) TICS: support teachers with technology needs

There are four levels of instructional coaching: 1) consulting, 2) collaborating, 3) observing, and 4) coaching. At the beginning of the year most of the need is at the consulting level. It is the goal to have most of the needs at the coaching level before the end of the year. It was shared that the coordinators



are using a task tracker (based on information from the book, *Taking the Lead*) to monitor the level of instructional coaching occurring. Isenberg asked if this would show a trend over the course of a year. It was shared that a trend or shift should become clear as the year progresses. Barry shared that the Teacher Leadership plan is in a state of growth and motion; which is good so that it can be adapted to meet the learning needs of students and teachers.

Linn-Mar is one of 39 districts that received the student-focused Teacher Leadership grant. Barry and Watts have done outside research on the best practices to implement the program and continue to research. Watts shared she has a close family connection to the Teacher Leadership program being offered in the Waukee District over the last few years.

It was shared that the Teacher Leadership team meet on Monday's and Fridays; with Friday meetings centering on PLC. Barry also shared that Mentors' priorities are first year teachers and Instructional Strategists' priorities are teachers new to the district with 5-10 years of teaching experience. Watts showed the task tracker designed to monitor the levels of coaching that are being utilized and shared that it is hard to pinpoint achievement in the first year due to so many variables. She also said that a single measurement to assess achievement doesn't give all the needed instructional data. Barry shared that a short term measure would be winter test scores and how they improve in the spring after the Instructional Strategists have had time to work with teachers. Hutcheson agreed that data collecting, applying effort, and overall information on district test scores are good combined measures. Patterson commented that the support from Teacher Leadership would increase teacher retention; which would also lead to better assessment scores. Watts shared some stories of success of the program in just the first week of school as well as information on the Waukee District's success with the program. Barry shared that the Teacher Leadership program works with all classes and grade levels and that it is not specific to general education, general classrooms, or elementary levels only.

#### Volunteer Program Report:

Karla Terry, Coordinator of Community Relations, reported on the success of the Volunteer Program. During the 2013-14 school year, there were 22,000 volunteer hours recorded. Volunteers hours are higher in elementary buildings where the need and parent on-site interaction is a little higher. This time last year, the district had 640 volunteers of which 550 have returned for the 2014-15 school year. The District currently has 1,050 registered volunteers. Volunteers are interviewed and receive one-on-one orientation through the Community Services office before volunteering in the buildings. Group orientations are offered at the beginning of the school year. There are currently 24 volunteer leaders with 13 community members acting as site managers. The program also has 11 event coordinators (i.e. America Reads); 3 of which are Linn-Mar graduates.

Community Services office will be hosting two Parent Universities this year:

- September 23<sup>rd</sup>: Patrick Morrissey with Rockwell Collins will share ideas on increasing computer network security in the home.
- November 4<sup>th</sup>: The Teacher Leadership coordinators will present information on the program.

Community Services continues to work in helping student leaders receive community recognition for their efforts, supports the United Way 55+ Initiative, and hosts their annual 100-Hour Volunteer Recognition.

Wilson commended Terry on her dedication to the volunteer program and the time and effort she shares in clearing people to volunteer in the schools.

### Superintendent's Report:

Katie Mulholland, Superintendent of Schools, shared an update with the Board on the following issues:

- District Newsletter: Sandie Rohrer, Coordinator of Communications and Media, has begun organizing the articles for the first issue and is working with Grant Wood AEA on the layout and printing. The newsletter will have a new format as well as a new masthead. The cost of mailing the newsletter to every resident versus distribution via the students is being assessed.
- Diversity Focus: Creative Corridor Center for Equity (C3E): C3E is a collaboration between businesses, educational institutions, and the community to explore new models to solve systemic challenges related to race and ethnicity. Current focuses: 1) Black Educator Recruitment and Retention (BERR), 2) Teacher Leadership Compensation System (TLC), 3) Diversity Beyond Labels for K-12, 4) The Equity Initiative, and 5) Project Achieve Development System. Action on joining C3E will be taken later in the agenda. Dirk Halupnik, Deputy Superintendent, would be the District representative. Mulholland recommended that a member of the Board also be involved with the program.
- Enrollment update: Mulholland asked Halupnik to share an update on enrollment counts for the first week of the 2014-15 school year. Highlights shared were:
  - Figures presented based on enrollment as of August 23<sup>rd</sup> and compared to data from the first week of the 2013-2014 school year.
  - Elementary enrollment: 3,377 students; up by 68 students.
  - Middle school enrollment: 1,642; up by 23 students.
  - High School enrollment: 2,078; up 144 students (includes 21 students from SUCCESS)
  - Total enrollment increase: around 150-200 students
  - Halupnik shared that the Novak/Bowman Woods boundary change helped with enrollment.
  - Echo Hill is largest elementary with 549 students (includes preschool and ECBP)
  - Third grade is largest elementary grade with 578 students
  - Sixth grade is largest middle school grade with 581 students
  - Ninth grade is largest high school grade with 590 students
  - October 1<sup>st</sup> is the State's official count date

### **OLD BUSINESS:**

#### **Approval of Fundraising Requests: Motion 029-08-25**

Rick Ironside, Executive Director of Support Services, shared there are a few corrections to Exhibit 901.1:

1. The Echo Hill Art to Remember and Indian Creek Square 1 Art fundraisers should reflect a start date of August 26th; both end on December 31, 2014.
2. The three Novak fundraisers are cancelled at this time and should not be considered because they did not meet Board policy and have not yet submitted their 2013-14 fundraising summaries as required.
3. The High School boys' athletics tennis training class should be removed as it is against Board policy.

Isenberg requested clarification on the PRIDE Volleyball fundraiser and why the Board was approving it if it was not a District sponsored program. Ironside clarified that it is a district youth program run by district staff which raises funds for our high school volleyball program.

Isenberg stated he was uncomfortable in telling a school no on fundraisers. Asked for clarification on how many times the 2013-14 Novak fundraiser summaries had been requested, Ironside clarified they had been requested since last spring approximately 5-6 times. Hutcheson shared that the Board policy was put in place three years ago and the Board has never penalized a building; why have a policy if we aren't going to enforce it. Patterson agreed with Hutcheson. Mulholland clarified that Novak can still host their walk-a-thon on the date scheduled, but that the event would not be able to be a fundraiser. Wilson shared that the Hy-Vee Receipt Collection program is not considered a fundraiser and should be removed from the fundraising approval list.

Motion by Patterson for the Board to approve the fundraising requests included in Exhibit 901.1 with the three deletions presented by Ironside. Second by Isenberg. Voice vote. Patterson, Hutcheson, Isenberg, Gadelha, and Stark voted in support of the motion. Wilson voted against the motion. Motion approved.

#### **Second Reading – Board Policies 200 Series: Board of Directors: Motion 030-08-25**

Motion by Isenberg for the Board to approve the 200 Series policies, *Board of Education*, for second reading as presented in Exhibit 902.1. Second by Stark.

Hutcheson stated that Policy 204.9 doubled in size and seems to have duplication of wording in paragraphs one and two; asked for clarification on the purpose of the additions made to the policy. Patterson shared the additions were made in an effort to combine Policy 204.9 with IASB language. Mulholland shared the Board can approve the entire 200 Series or pull out individual policies that need further consideration and approve the remainders. Hutcheson requested policy 204.9 be excluded from the motion to approve for further consideration. Gadelha requested that the wording in Policy 204.9 referring to the need for the audience communications to be submitted to the superintendent prior to presentation be removed. Patterson shared the wording allowed the Board to research the audience questions for a better understanding prior to the Board meetings. Patterson clarified that Policy 204.9 would be pulled from the motion to approve for further consideration.

Motion amended by Isenberg for the Board to approve the 200 Series policies, excluding Policy 204.9, for second reading. Second by Gadelha. Voice vote. Amended motion unanimously approved.

#### **Second Reading – Board Policies 300 Series: Administration: Motion 031-08-25**

Motion by Isenberg for the Board to approve the 300 Series policies, *Administration*, for second reading as presented in Exhibit 903.1. Second by Stark.

Gadelha asked that the Iowa Association of School Board's (IASB) language be added to Policy 302.5: *Superintendent Evaluation*, to reflect that the process is: "these individual evaluations will be compiled into an overall evaluation by the entire board," for bullet three under the formal evaluation heading rather than the proposed language, "these individual evaluations will be compiled into an overall evaluation by the Board president." She commented that a number of Board policies do incorporate much of the IASB language. Hutcheson stated he did not support Gadelha's suggestion because one person, the Board president, compiles all of the responses when the entire Board is involved in the superintendent's evaluation process. Hutcheson also stated that the previous issue during the superintendent evaluation that occurred was a timing issue and not a recurring issue. Mulholland clarified that regulations can be developed independently from policy. Patterson suggested that Policy 302.5 be approved as presented and a regulations piece be developed and added.

Voice vote. Motion unanimously approved.

**Second Reading – Policy 701.1: Local and State Transportation Regulations: Motion 032-08-25**

Motion by Isenberg that the Board approve Policy 701.1, *Local and State Transportation Regulations*, for second reading as presented in Exhibit 904.1. Second by Stark. Voice vote. Motion unanimously approved.

**Approval of Agreement with ECRA Group, Inc., HYA Executive Search: Motion 033-08-25**

Motion by Stark for the Board to approve the Letter of Agreement with ECRA Group, Inc., and its Hazard, Young, Attea Executive Search Division (HYA) for services provided for the superintendent search as outlined in the *Proposal and Description of Services* (Exhibit 905.1) previously provided to the Board for the amount of \$15,500; payable in three installments. Second by Hutcheson. Hutcheson clarified a typo in the Board agenda regarding the fee for services and that it should read \$15,500 instead of \$15,5000. Voice vote. Motion unanimously approved.

**NEW BUSINESS:**

**Diversity Focus: Invitation to Partner with Creative Corridor Center for Equity (C3E): Motion 034-08-25**

Mulholland shared that information was presented on the program during her earlier report and the program involves the metro area and Iowa City districts. Hutcheson stated that there were only four requirements listed and asked for clarification if other requirements will be required. Mulholland clarified that the Board can opt in or out of activities and reminded Board that Dirk Halupnik, Deputy Superintendent, would be the District representative.

Motion by Hutcheson for the Board to approve moving forward in becoming a charter partner with Creative Corridor Center for Equity (C3E). Second by Gadelha. Voice vote. Motion unanimously approved.

**First Reading – Board Policies 400 Series: Staff Personnel: Motion 035-08-25**

Mulholland requested the Board pull Policy 401.10, *Licensed Personnel Early Separation*, as it will be considered later in the agenda.

Motion by Hutcheson for the Board to approve the 400 Series policies, *Staff Personnel*, for first reading as presented in Exhibit 1002.1 with the exception of Policy 401.10. Second by Gadelha. Voice vote. Motion unanimously approved.

**Policy 401.10 – Licensed Personnel Early Separation: Motion 036-08-25**

Mulholland shared that she was approached a few weeks ago by a senior employee asking if the terms of eligibility for early separation could be amended to 10 years of experience at Linn-Mar and 20 years of total teaching experience. Early separation benefit is 50% of employee's salary. Mulholland asked JT Anderson, District CFO, to look at finances and found that there would be a financial benefit to the district if this was offered. There are currently three employees that would miss out on early separation benefits if they do not take advantage of the policy in 2015, as currently stated, with the 20 years of experience. Notifications are made to all eligible teachers with a required response date of October 12<sup>th</sup> for letters of intent; only those who submit letters of intent are eligible for allotted packages. Packages will then be awarded in order of date/time the letters of retirement are received. Letters of retirement can be rescinded prior to the end of the work day on January 12<sup>th</sup>. However, once approved by the Board; they cannot be rescinded. Stark raised the question on how past recipients would feel due to proposed wording change. Mulholland clarified that the policy wording is at the Board's discretion and that early separation is an opportunity; not a guarantee. Patterson stated that the changes in wording could be changed the following year if necessary. Morrison clarified that it is the intent of the law to review the policy annually; so annual changes are allowable. Anderson stated that critical mass would be best met if the 10-years of experience option was offered on an every-other-year basis.

Motion by Hutcheson for the Board to approve, for the Class of 2015 only, the early separation eligibility option of 10 years of experience within the Linn-Mar District instead of 20 years, with 20 years of total teaching experience. Second by Stark. Voice vote. Motion unanimously approved.

**Open Enrollment Requests: Motion 037-08-25**

Motion by Hutcheson for the Board to approve the Open Enrollment Requests as presented. Second by Isenberg. Voice vote. Motion unanimously approved.

**DENIED IN:**

Name	Grade	Resident District	Reason
Jacobsen, Brinnley	4 <sup>th</sup>	Cedar Rapids	Late, No Good Cause
Jacobsen, Cayen	1 <sup>st</sup>	Cedar Rapids	Late, No Good Cause
Jacobsen, Gary	5 <sup>th</sup>	Cedar Rapids	Late, No Good Cause
Prevo, Andrew	2 <sup>nd</sup>	Cedar Rapids	Late, No Good Cause
Schaub, Greta	5 <sup>th</sup>	Cedar Rapids	Late, No Good Cause
Schaub, Rory	1 <sup>st</sup>	Cedar Rapids	Late, No Good Cause

**APPROVED IN:**

Name	Grade	Resident District	Reason
Banks, Kody	K	Mount Vernon	On Time
Ness, William	2 <sup>nd</sup>	Cedar Rapids	Good Cause
VanMeter, Alexis	10 <sup>th</sup>	Marion	Good Cause

**DENIED OUT:**

Name	Grade	Receiving District	Reason
Kovarik, Morgan	9 <sup>th</sup>	Marion	Late, No Good Cause

**APPROVED OUT:**

Name	Grade	Receiving District	Reason
Covill, Madison	11 <sup>th</sup>	Marion	Good Cause

**CONSENT AGENDA: Motion 038-08-25**

Motion by Stark for the Board to approve the Consent Agenda as presented; including the personnel walk-in exhibit. Second by Hutcheson. Voice vote. Motion unanimously approved.

1101 Personnel

**Certified Staff: Assignment – Reassignment - Transfer**

Name	Assignment	Dept Action	Salary Placement
Woods, Kimberly	OR: Guidance Counselor	August 20, 2014	MA Step 1

**Classified Staff: Assignment – Reassignment - Transfer**

Name	Assignment	Dept Action	Salary Placement
Anderson, Tara	LRC: Part-time Admin Asst	August 25, 2014	\$12.00/hour
Behrens, Jodi	WF: Media Assistant	August 13, 2014	I, Step 10
Bochicchio, Heidi	HS: Lead Cook	August 18, 2014	A, Step 1 +.25
Boddicker, Heidi	LG: Part-time Ed Assistant	August 13, 2014	I, Step 6
Callahan, Mary	EX: Student Support Assoc – Recall from RIF	August 13, 2014	Same

Ciha, Nikki	HS: Student Support Assoc	August 13, 2014	II, Step 6
Decious, Becky	BW: Part-time Ed Assistant	August 19, 2014	I, Step 10
Garrett, Dawn	LG: From Part-time to Full-time SSA	August 13, 2014	Same
Groth, Cindy	TR: Bus Rider	August 13, 2014	Step 1
Guthrie, Kellee	LG: From Part-time to Full-time SSA	August 13, 2014	Same
Martin, Terri	OR: Student Support Assoc	August 13, 2014	II, Step 10
Morgan, Stephanie	BW: Student Support Assoc	August 19, 2014	II, Step 7
Noeller, Mary	TR: Bus Rider	August 13, 2014	Step 1
Oakley, Lora	WE: Student Support Assoc	August 13, 2014	II, Step 10
Ruffles, Brian	AC: From Youth Coordinator to Aquatics Assistant and Youth Swim Team Coordinator	August 12, 2014	\$17.00/hour
Sykes, Karen	From HS to EX Custodian	August 14, 2014	Same
Talley, Trish	IC: From Part-time Ed Asst to Part-time Ed Asst/Part-time Paraprofessional	August 13, 2014	Same
Witter, Sara	LG: Student Support Assoc	August 20, 2014	II, Step 7

#### **Classified Staff: Resignation**

<b>Name</b>	<b>Assignment</b>	<b>Dept Action</b>	<b>Reason</b>
Atwater, Jordan	O&M: Summer Help	August 11, 2014	Position Ended
Evans, Tristan	O&M: Summer Help	August 11, 2014	Position Ended
Frank, Jennifer	EX: Health Assistant	August 29, 2014	Other Employment
<b>Name</b>	<b>Assignment</b>	<b>Dept Action</b>	<b>Reason</b>
Grundmeyer, Drew	O&M: Summer Help	July 31, 2014	Position Ended
Harre, Julie	BW: Student Support Assoc	August 1, 2014	Other Employment
Haut, Jim	EX: Lead Custodian	August 8, 2014	Other Employment
Hopkins, Ken	O&M: Summer Help	August 11, 2014	Position Ended
Lawrence, Zach	O&M: Summer Help	August 19, 2014	Position Ended
Pfau, Eric	O&M: Summer Help	August 11, 2014	Position Ended
Pfau, Sue	O&M: Summer Help	August 11, 2014	Position Ended
Rankin, Mary	LG: Student Support Assoc	August 14, 2014	Personal
Stevens, Mary	EH: General Ed Assistant	August 30, 2014	Personal
Timm, Jeff	O&M: General Maintenance	August 18, 2014	Personal
Trautman, Tim	O&M: Summer Help	August 12, 2014	Position Ended
Weber, Marcy	NE: Paraprofessional	August 19, 2014	Other Employment
Wright, Keith	O&M: Summer Help	August 11, 2014	Position Ended

**Extra-Curricular Positions: Assignment – Reassignment - Transfer**

<b>Name</b>	<b>Assignment</b>	<b>Dept Action</b>	<b>Salary Placement</b>
Abbott, Megan	EX: Assistant 8 <sup>th</sup> Gr Volleyball Coach	August 25, 2014	Schedule H, Category E
Evans, Tristan	EX: Assistant 8 <sup>th</sup> Gr Football Coach	August 12, 2014	Schedule H, Category E
Snead, Chelsi	OR: Head 8 <sup>th</sup> Gr Volleyball Coach	August 21, 2014	Schedule H, Category D

**Extra-Curricular Positions: Resignation**

<b>Name</b>	<b>Assignment</b>	<b>Dept Action</b>	<b>Reason</b>
Frangella, Nate	HS: Head 9 <sup>th</sup> Gr Baseball Coach	August 15, 2014	Personal
Kauffman, Doug	OR: Assistant 8 <sup>th</sup> Gr Volleyball Coach	August 18, 2014	Personal
Sinnott, Matt	EX: Assistant 8 <sup>th</sup> Gr Volleyball Coach	August 12, 2014	Personal
Terrell, Dan	HS: Auditorium Manager	August 18, 2014	Personal

**1102** **Approval of Minutes:** Minutes from August 11, 2014 Board meeting

**1103** **Approval of Bills:** Special Revenue, General, and Nutrition Fund Bills

**1104** **Approval of Contracts**

The administration recommends the Board approve the following contracts as presented:

1. 2014-15 contract for scheduling of officials with ArbiterSports.com
2. 2014-15 contract for scheduling of officials with Randy Krejci
3. 2014-15 contract for scheduling of officials with ECISOA
4. 2014-15 contract for scheduling of officials with Eastern Iowa Wrestling Officials Association
5. 2014-15 contract for scheduling of officials with CRAOA
6. 2014-15 contract for scheduling of officials with ECIVOA

**1105** **Board Information:** 2013 & 2014 FY Cash Balance Financial Reports

**1106** **Items removed from the consent agenda for separate action:** No items presented.

**COMMUNICATIONS, ANNOUNCEMENTS, AND TRANSMITTALS:**

Isenberg shared that he and Patterson attended the High School Renovations Steering Committee meeting and it was a good discussion. The radio tower on the north side of the High School will be a complicated project and the Technology Committee is looking at various options. It was clarified that abatement cost was included in the \$30M cap. Isenberg was impressed with the dedication and presentation of DLR Architects. Patterson shared that the High School administration has a plan outlined for “worse case” scenarios which would allow construction to occur while the students were in the building. DLR will take this into account while planning the renovation construction staging timeline.

Gadelha commended High School and Oak Ridge administration and staff for hosting great orientations for new parents. Gadelha also shared that the Marion Planning and Zoning Commission has approved

the installation of a mini-roundabout at the intersection of 29<sup>th</sup> Avenue and 35<sup>th</sup> Street; with tentative completion within the next two years.

Gadelha requested a report on the Home School program at the September 8<sup>th</sup> Board meeting.

**ADJOURNMENT: Motion 039-08-25**

Motion by Wilson to adjourn the regular session at 9:40 PM. Second by Gadelha. Voice vote. Motion unanimously approved.

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Barry Buchholz, Board President

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Angie Morrison, Board Secretary

*Respectfully submitted by:  
Gayla Burgess, Admin Asst to the Superintendent  
August 25, 2014*



## Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2013-2014

Vendor Name	Description	Check Total
<b>Fund: GENERAL</b>		
CEDAR RAPIDS COMM SCH DIST	TUITION: STUDENT	\$900.18
CITY LAUNDERING COMPANY	LAUNDRY SERVICE	\$950.45
DAVIS COUNTY COMMUNITY SCHOOL DISTRICT	TUITION IN STATE	\$3,721.32
<b>Fund Total:</b>		<b>\$5,571.95</b>
<b>Grand Total:</b>		<b>\$5,571.95</b>

End of Report

## Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2014-2015

Vendor Name	Description	Check Total
<b>Fund: Aquatic Center</b>		
BMO MASTERCARD	GENERAL SUPPLIES	\$304.10
SPLASH MULTISPORT	GENERAL SUPPLIES	\$162.00
<b>Fund Total:</b>		<b>\$466.10</b>
<b>Fund: GENERAL</b>		
ABC FIRE PROTECTION	GENERAL SUPPLIES	\$647.25
ABLENET, INC	INSTRUCTIONAL SUPPLIES	\$610.72
ABS ACTIVITY BASED SUPPLIES	INSTRUCTIONAL SUPPLIES	\$1,133.83
AIRGAS NORTH CENTRAL	INSTRUCTIONAL SUPPLIES	\$352.14
ALLIANT ENERGY	ELECTRICITY	\$89,446.76
AMERICAN SPECIALTIES	GENERAL SUPPLIES	\$15.00
AMERICAN SPECIALTIES	INSTRUCTIONAL SUPPLIES	\$25.00
ANCHOR FRAME & AXLE	VEHICLE REPAIR	\$690.59
ARCHITECTURAL ARTS, INC	EQUIPMENT >\$1999	\$3,667.00
ARNOLD MOTOR SUPPLY	TRANSP. PARTS	\$671.67
ASCD	DUES AND FEES	\$89.00
AUS WATERLOO MC LOCKBOX	GENERAL SUPPLIES	\$1,519.66
B & H PHOTO	COMP/TECH HARDWARE	\$1,221.10
BAKER & TAYLOR, INC	LIBRARY BOOKS	\$95.78
BALLARD & TIGHE, PUBLISHERS	INSTRUCTIONAL SUPPLIES	\$101.05
BATTERIES PLUS	MAINTENANCE SUPPLIES	\$342.43
BAUDVILLE INC	MAINTENANCE SUPPLIES	\$135.45
BLICK ART MATERIALS	INSTRUCTIONAL SUPPLIES	\$1,310.77
BMO MASTERCARD	DUES AND FEES	\$1,104.00
BMO MASTERCARD	EQUIPMENT >\$1999	\$159.17
BMO MASTERCARD	GENERAL SUPPLIES	\$2,871.92
BMO MASTERCARD	GROUNDS UPKEEP	\$126.00
BMO MASTERCARD	INSTRUCTIONAL SUPPLIES	\$7,711.46
BMO MASTERCARD	MAINTENANCE SUPPLIES	\$372.00
BMO MASTERCARD	REF & RSRCH MATERIAL	\$106.29
BMO MASTERCARD	RENTALS EQUIPMENT	\$323.40
BMO MASTERCARD	REPAIR PARTS	\$77.34
BMO MASTERCARD	STAFF WORKSH/CONF	\$1,335.58
BMO MASTERCARD	TEXTBOOKS	\$24.15
BMO MASTERCARD	TRAVEL	\$1,410.74
BRUCE'S WOODSHOP	INSTRUCTIONAL SUPPLIES	\$173.43
C.J. COOPER & ASSOCIATES	PHYSICALS	\$70.00
C.R. GLASS CO	MAINTENANCE SUPPLIES	\$522.93
CAROLINA BIOLOGICAL SUPPLY	INSTRUCTIONAL SUPPLIES	\$104.82
CARROLL DISTRIBUTING	REPAIR PARTS	\$673.49
CARSON-DELLOSA PUBLISHING	INSTRUCTIONAL SUPPLIES	\$305.17
CDW - GOVERNMENT	COMP/TECH HARDWARE	\$150.00
CEDAR RAPIDS WATER DEPT	WATER/SEWER	\$277.35
CENTURYLINK	TELEPHONE	\$690.40
CESA #11	INSTRUCTIONAL SUPPLIES	\$297.00

# Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2014-2015

Vendor Name	Description	Check Total
CHIROPRACTIC OF IOWA	PHYSICALS	\$210.00
CITY LAUNDERING COMPANY	LAUNDRY SERVICE	\$375.36
CITY OF ROBINS	WATER/SEWER	\$304.96
CITY TREASURER'S OFFICE	INSTRUCTIONAL SUPPLIES	\$75.00
COLTON MICHELLE	PROF SERV: EDUCATION	\$1,200.00
CROELL REDI-MIX INC	GROUNDS UPKEEP	\$2,816.75
CULLIGAN	SERVICE AGREEMENTS	\$952.98
DECKER EQUIPMENT	INSTRUCTIONAL SUPPLIES	\$618.98
DEMCO	GENERAL SUPPLIES	\$833.99
DEMOULIN BROS & COMPANY	INSTRUCTIONAL SUPPLIES	\$59.95
DOCUMENT DESTRUCTION & RECYCLING	INSTRUCTIONAL SUPPLIES	\$48.25
DOORS INC	REPAIR PARTS	\$62.34
DRYSPACE INC	REPAIR/MAINT SERVICE	\$1,644.77
DUCHESS CLEANERS	INSTRUCTIONAL SUPPLIES	\$959.31
ECRA GROUP INCORPORATED	OTHER PROFESSIONAL	\$7,750.00
EDVOTEK	INSTRUCTIONAL SUPPLIES	\$358.60
EILERS WILDLIFE CONTROL & REMOVAL	REPAIR/MAINT SERVICE	\$500.00
ELECTRONIX	GENERAL SUPPLIES	\$131.68
ESPECIAL NEEDS, LLC	INSTRUCTIONAL SUPPLIES	\$166.69
FAMILY VIDEO	FACILITY RENTAL	\$3,422.85
FAREWAY STORES	INSTRUCTIONAL SUPPLIES	\$111.97
FAREWAY STORES	MAINTENANCE SUPPLIES	\$146.88
FASTENAL COMPANY	GENERAL SUPPLIES	\$124.82
FASTENAL COMPANY	MAINTENANCE SUPPLIES	\$227.77
FOLLETT SCHOOL SOLUTIONS, INC	TEXTBOOKS	\$2,741.83
GASWAY CO, J P	GENERAL SUPPLIES	\$2,721.07
GASWAY CO, J P	INSTRUCTIONAL SUPPLIES	\$244.38
GAZETTE COMMUNICATIONS INC	ADVERTISING	\$163.20
GRANT WOOD AEA	INSTRUCTIONAL SUPPLIES	\$50.00
H-H INCORPORATED OF IOWA	REPAIR PARTS	\$202.90
HALF PRICE BOOKS	LIBRARY BOOKS	\$107.57
HANCOCK FABRICS-8011	INSTRUCTIONAL SUPPLIES	\$99.04
HARGERS ACCOUSTICS INC	MAINTENANCE SUPPLIES	\$2,032.50
HOTSY CLEANING SYSTEMS	GENERAL SUPPLIES	\$10.00
IACTE	STAFF WORKSHP/CONF	\$150.00
IAM CLOUD LIMITED	COMP/TECH HARDWARE	\$5,400.00
IASB	OTHER PROFESSIONAL	\$63.00
INTERSTATE ALL BATTERY CENTER	MAINTENANCE SUPPLIES	\$696.10
INVOLTA	OTHER TECH SER	\$350.00
IOWA DIVISION OF CRIMINAL INVEST	OTHER PROFESSIONAL	\$950.00
IOWA DIVISION OF LABOR	REPAIR/MAINT SERVICE	\$2,040.00
IOWA HIGH SCHOOL MUSIC ASSOC	INSTRUCTIONAL SUPPLIES	\$25.00
IOWA HS ATHLETIC DIR ASSOC	DUES AND FEES	\$290.00
IOWA PRISON INDUSTRIES	MAINTENANCE SUPPLIES	\$1,856.63
ISBGA	DUES AND FEES	\$100.00

# Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2014-2015

Vendor Name	Description	Check Total
JOHNSTONE SUPPLY	REPAIR PARTS	\$381.25
JVA MOBILITY	EQUIPMENT >\$1999	\$3,590.78
JVA MOBILITY	INSTRUCTIONAL SUPPLIES	\$117.00
KONE INC	REPAIR/MAINT SERVICE	\$173.56
LAKESHORE	INSTRUCTIONAL SUPPLIES	\$1,383.37
LASER RESOURCES, LLC	INSTRUCTIONAL SUPPLIES	\$639.00
LINN CO-OP OIL	GASOLINE	\$7,550.98
LINN-MAR NUTRITION SERVICES	INSTRUCTIONAL SUPPLIES	\$54.89
MARION JANITORIAL SUPPLY CO	GENERAL SUPPLIES	\$73.14
MARION JANITORIAL SUPPLY CO	MAINTENANCE SUPPLIES	\$575.97
MARION TIMES	ADVERTISING	\$743.76
MATHESON-LINDWELD	INSTRUCTIONAL SUPPLIES	\$390.30
MATHESON-LINDWELD	MAINTENANCE SUPPLIES	\$99.70
MAYER-JOHNSON LLC	INSTRUCTIONAL SUPPLIES	\$209.00
MCCORMACK DISTRIBUTING	REPAIR PARTS	\$26.93
MCGRAW-HILL SCHOOL EDUCATION	INSTRUCTIONAL SUPPLIES	\$589.84
MENARDS -13127	GENERAL SUPPLIES	\$42.57
MENARDS -13127	INSTRUCTIONAL SUPPLIES	\$753.01
MERCY EAP SERVICES	OTHER PROFESSIONAL	\$136.00
MH ADVERTISING SPECIALTIES	INSTRUCTIONAL SUPPLIES	\$315.00
MID AMERICAN ENERGY	NATURAL GAS	\$6,006.74
MIDWAY OUTDOOR EQUIPMENT INC	EQUIPMENT REPAIR	\$181.09
MIDWEST BUS PARTS, INC	TRANSP. PARTS	\$385.95
MT VERNON RD AUTO CENTER INC	VEHICLE REPAIR	\$294.60
MUTUAL WHEEL CO	TRANSP. PARTS	\$22.19
NANCY BRIGHT	OTHER PROFESSIONAL	\$500.00
NASCO	INSTRUCTIONAL SUPPLIES	\$2,443.78
NEFF	INSTRUCTIONAL SUPPLIES	\$5,549.04
NEIBA	INSTRUCTIONAL SUPPLIES	\$60.00
NGUYEN LEE	PROF SERV: EDUCATION	\$300.00
OFFICE EXPRESS	INSTRUCTIONAL SUPPLIES	\$4,708.47
ORKIN PEST CONTROL	SERVICE AGREEMENTS	\$290.00
ORTIZ ROBERT	INSTRUCTIONAL SUPPLIES	\$30.81
P & K MIDWEST	REPAIR PARTS	\$156.45
PAETEC	TELEPHONE	\$410.15
PARLOR CITY ICE CREAM	INSTRUCTIONAL SUPPLIES	\$446.50
PEPPER J.W. & SON, INC	INSTRUCTIONAL SUPPLIES	\$238.49
PHONAK	EQUIPMENT >\$1999	\$3,262.50
PHONAK	INSTRUCTIONAL SUPPLIES	\$836.49
PLUMBERS SUPPLY COMPANY	REPAIR PARTS	\$1,004.81
POELLET, SHAWN	GENERAL SUPPLIES	\$1,147.50
POLAR ELECTRO INC	INSTRUCTIONAL SUPPLIES	\$1,273.83
POOL TECH MIDWEST INC	MAINTENANCE SUPPLIES	\$8.70
PORT'O'JONNY	INSTRUCTIONAL SUPPLIES	\$183.00
POSTMASTER	POSTAGE/UPS	\$4,000.00

# Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2014-2015

Vendor Name	Description	Check Total
PREMIER AGENDAS INC	INSTRUCTIONAL SUPPLIES	\$318.45
QUALITY AUTO REBUILDERS	VEHICLE REPAIR	\$2,805.78
QUALITY CLEANING EQUIPMENT	GENERAL SUPPLIES	\$258.30
QUILL CORPORATION	GENERAL SUPPLIES	\$71.92
QUILL CORPORATION	INSTRUCTIONAL SUPPLIES	\$900.10
QUINN STORAGE	FACILITY RENTAL	\$75.00
RAPIDS REPRODUCTIONS INC	INSTRUCTIONAL SUPPLIES	\$26.00
REINHART INSTITUTIONAL FOODS INC	INSTRUCTIONAL SUPPLIES	\$224.24
RODKE, THOMAS	TXTBK RENTAL PS	\$55.00
ROSENDALE STEPHANIE	PROF SERV: EDUCATION	\$402.00
ROYAL IMAGING SUPPLIES	GENERAL SUPPLIES	\$478.40
ROYAL IMAGING SUPPLIES	INSTRUCTIONAL SUPPLIES	\$599.50
SADLER POWER TRAIN	TRANSP. PARTS	\$265.74
SCANTRON	INSTRUCTIONAL SUPPLIES	\$224.65
SCHOLASTIC MAGAZINE	INSTRUCTIONAL SUPPLIES	\$647.97
SCHOLASTIC MAGAZINE	TEACHER PAY	\$270.94
SCHOOL HEALTH ALERT	GENERAL SUPPLIES	\$714.87
SCHOOL HEALTH CORP	GENERAL SUPPLIES	\$537.79
SCHOOL SPECIALTY INC	INSTRUCTIONAL SUPPLIES	\$9,446.85
SCHOOLMASTERS SAFETY	MAINTENANCE SUPPLIES	\$79.98
SCHUMACHER ELEVATOR	SERVICE AGREEMENTS	\$743.40
SEXAUER	REPAIR PARTS	\$258.13
SHRED-IT DES MOINES	GENERAL SUPPLIES	\$47.94
SIGN PRO	GENERAL SUPPLIES	\$251.10
SIGNS & DESIGNS	Building Repairs	\$2,370.00
SOLUTION TREE	INSTRUCTIONAL SUPPLIES	\$138.75
SPLASH MULTISPORT	INSTRUCTIONAL SUPPLIES	\$1,626.00
STAR AUTISM SUPPORT INC	INSTRUCTIONAL SUPPLIES	\$243.10
STARFALL	INSTRUCTIONAL SUPPLIES	\$70.00
SYTSMA, LANDON	INSTRUCTIONAL SUPPLIES	\$45.00
TEXTBOOK WAREHOUSE	TEXTBOOKS	\$2,288.33
THE COUNCIL FOR EXCEPTIONAL CHILDREN	INSTRUCTIONAL SUPPLIES	\$205.00
TJ REICHER INC.	INSTRUCTIONAL SUPPLIES	\$3,000.00
TRIARCO ARTS & CRAFTS	INSTRUCTIONAL SUPPLIES	\$2,822.31
TYLER BUSINESS FORMS	GENERAL SUPPLIES	\$341.66
U.S. TOY CO	INSTRUCTIONAL SUPPLIES	\$163.33
UNITED ART & EDUCATION	INSTRUCTIONAL SUPPLIES	\$898.05
VALUE INSPIRED PRODUCTS/SERVICES	EQUIPMENT >\$1999	\$5,992.15
VALUE INSPIRED PRODUCTS/SERVICES	INSTRUCTIONAL SUPPLIES	\$4,495.92
WALMART	GENERAL SUPPLIES	\$1,421.38
WALMART	INSTRUCTIONAL SUPPLIES	\$445.45
WALSH DOOR & HARDWARE	REPAIR PARTS	\$710.00
WENDLING QUARRIES	GROUNDS UPKEEP	\$227.81

**Fund Total: \$263,154.39**

# Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 08/22/2014 - 09/04/2014

Fiscal Year: 2014-2015

Vendor Name	Description	Check Total
<b>Fund: LOCAL OPT SALES TAX</b>		
AOSNC, LLC	COMP/TECH HARDWARE	\$2,020.00
NETWORK COMPUTER SOLUTIONS E.IA	COMP/TECH HARDWARE	\$4,686.92
<b>Fund Total:</b>		<b>\$6,706.92</b>
<b>Fund: NUTRITION SERVICES</b>		
BMO MASTERCARD	EQUIPMENT REPAIR	(\$37.51)
BMO MASTERCARD	GENERAL SUPPLIES	\$392.40
BMO MASTERCARD	PURCHASE FOOD	\$172.28
FLETCHER, GOLDEN	DEFERRED REVENUE	\$66.05
HUMITECH OF IOWA INC	REPAIR/MAINT SERVICE	\$138.00
OFFICE EXPRESS	GENERAL SUPPLIES	\$284.81
PIZZA HUT OF AMERICA, INC. & AFFIL	PURCHASE FOOD	\$247.46
RAPIDS WHOLESALE EQUIP CO	GENERAL SUPPLIES	\$1,268.26
RAPIDS WHOLESALE EQUIP CO	MACHINERY AND EQUIP	\$4,240.00
RODKE MARIA	DEFERRED REVENUE	\$50.30
SCHOOL NUTRITION ASSOCIATION	DUES AND FEES	\$109.75
SYTSMA, LONDON	DEFERRED REVENUE	\$11.50
WALMART	GENERAL SUPPLIES	\$108.63
<b>Fund Total:</b>		<b>\$7,051.93</b>
<b>Fund: PHY PLANT &amp; EQ LEVY</b>		
A & J ASSOCIATES	CONSTRUCTION SERV	\$45.00
BRECKE	EQUIPMENT >\$1999	\$6,322.90
CAPITAL SANITARY	EQUIPMENT >\$1999	\$8,026.39
DLR GROUP INC	ARCHITECT	\$52,609.52
OK TOPS LLC	CONSTRUCTION SERV	\$3,786.00
PEERBOLTE CREATIVE LLC	CONSTRUCTION SERV	\$2,000.00
PLUMBERS SUPPLY COMPANY	CONSTRUCTION SERV	\$961.12
PLUMBERS SUPPLY COMPANY	EQUIPMENT REPAIR	\$815.45
PRIMARY SYSTEMS	CONSTRUCTION SERV	\$631.80
TERRACON CONSULTANTS INC	CONSTRUCTION SERV	\$3,987.50
TY-CO PAINTING INC	CONSTRUCTION SERV	\$14,925.00
VAN METER CO	EQUIPMENT >\$1999	\$10,204.20
WALSH DOOR & HARDWARE	EQUIPMENT REPAIR	\$1,103.62
<b>Fund Total:</b>		<b>\$105,418.50</b>
<b>Fund: Pool 10 Million Issue and 2013 10M Issue</b>		
DLR GROUP INC	ARCHITECT	\$6,548.54
STOREY KENWORTHY	EQUIPMENT >\$1999	\$24,031.16
TERRACON CONSULTANTS INC	CONSTRUCTION SERV	\$1,133.75
<b>Fund Total:</b>		<b>\$31,713.45</b>
<b>Fund: PUB ED &amp; REC LEVY</b>		
BLUE GRASS ENTERPRISES INC	GROUNDS UPKEEP	\$756.00
D&N FENCE CO	CONSTRUCTION SERV	\$8,550.00
D.C. CONCRETE	CONSTRUCTION SERV	\$2,800.00
EVER-GREEN LANDSCAPE & SUPPLY	GROUNDS UPKEEP	\$8,880.00

# Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

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Vendor Name	Description	Check Total
MIRACLE RECEPTION EQUIPMENT	EQUIPMENT REPAIR	\$1,014.34
<b>Fund Total:</b>		<b>\$22,000.34</b>
<b>Fund: STUDENT ACTIVITY</b>		
ALBERT, JANET	MISC REVENUE	\$166.00
APPAREL 1	INSTRUCTIONAL SUPPLIES	\$5,956.00
B & H PHOTO	INSTRUCTIONAL SUPPLIES	\$538.90
BAB SPORTS INC	INSTRUCTIONAL SUPPLIES	\$5,420.00
BMO MASTERCARD	DUES AND FEES	\$176.25
BMO MASTERCARD	INSTRUCTIONAL SUPPLIES	\$3,919.44
BRUST, JAMES	OFFICIAL/JUDGE	\$60.00
BURDT SAM	OFFICIAL/JUDGE	\$50.00
CALDBECK CHRIS	OFFICIAL/JUDGE	\$95.00
CEDAR FALLS HIGH SCHOOL	DUES AND FEES	\$90.00
CEDAR RAPIDS CORVETTE CLUB	INSTRUCTIONAL SUPPLIES	\$120.00
CEDAR RAPIDS WASHINGTON HIGH SCHOOL	DUES AND FEES	\$75.00
COOPER JOHN	OFFICIAL/JUDGE	\$90.00
COREY BRINKMEYER	INSTRUCTIONAL SUPPLIES	\$350.00
COTTON GALLERY LTD.	INSTRUCTIONAL SUPPLIES	\$3,953.90
DOBEL CHRIS	OFFICIAL/JUDGE	\$104.20
DRAMATISTS PLAY SERVICE	INSTRUCTIONAL SUPPLIES	\$240.00
ENZUGUSI, SIBIL	MISC REVENUE	\$65.00
FRIDAY MATT	OFFICIAL/JUDGE	\$55.00
GLOE CARL	OFFICIAL/JUDGE	\$65.00
GORDAN FREEMAN	OFFICIAL/JUDGE	\$55.00
HALLS PHOTO	INSTRUCTIONAL SUPPLIES	\$26.00
INTERSTATE DECAL	INSTRUCTIONAL SUPPLIES	\$260.70
IOWA ASSOC.OF TRACK COACHES	DUES AND FEES	\$45.00
IOWA BASKETBALL COACHES ASSOC	DUES AND FEES	\$140.00
IOWA HIGH SCHOOL SPEECH ASSOC	DUES AND FEES	\$75.00
ISSA, JULIE & ANTHONY	INSTRUCTIONAL SUPPLIES	\$30.00
JEFFERSON HIGH SCHOOL	DUES AND FEES	\$50.00
JIMMY JOHN'S	INSTRUCTIONAL SUPPLIES	\$572.00
JOHNSON BRADLEY DAVID	OFFICIAL/JUDGE	\$50.00
JYM BAG	INSTRUCTIONAL SUPPLIES	\$887.50
KEITH M MERRICK CO INC	INSTRUCTIONAL SUPPLIES	\$617.15
KEITH ZIEGLER	OFFICIAL/JUDGE	\$60.00
LIDS TEAM SPORTS	INSTRUCTIONAL SUPPLIES	\$4,200.00
MCMMASTER-CARR	INSTRUCTIONAL SUPPLIES	\$96.82
MH ADVERTISING SPECIALTIES	INSTRUCTIONAL SUPPLIES	\$632.50
MONTICELLO SPORTS	INSTRUCTIONAL SUPPLIES	\$1,261.00
MORGAN JOHN	OFFICIAL/JUDGE	\$55.00
MUSCATINE HIGH SCHOOL	DUES AND FEES	\$80.00
NATHAN JOHN SEVERSON	INSTRUCTIONAL SUPPLIES	\$450.00
NEFF	INSTRUCTIONAL SUPPLIES	\$1,023.79
NORRIS CALVIN	OFFICIAL/JUDGE	\$50.00

# Linn-Mar Community School District

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Vendor Name	Description	Check Total
PIONEER DRAMA SERVICE INC	INSTRUCTIONAL SUPPLIES	\$228.00
PIZZA HUT OF AMERICA,INC.& AFFIL	INSTRUCTIONAL SUPPLIES	\$155.49
PIZZA RANCH	INSTRUCTIONAL SUPPLIES	\$213.00
PRAIRIE HIGH SCHOOL	DUES AND FEES	\$190.00
SCHAUB STEVE	OFFICIAL/JUDGE	\$50.00
SCHNEEKLOTH TERRY	OFFICIAL/JUDGE	\$55.00
SESKER KENT	OFFICIAL/JUDGE	\$55.00
SPORT SUPPLY GROUP INC	INSTRUCTIONAL SUPPLIES	\$3,206.72
STORM STEEL	INSTRUCTIONAL SUPPLIES	\$216.24
STURENFELDT ROB	OFFICIAL/JUDGE	\$25.00
TARGET	INSTRUCTIONAL SUPPLIES	\$45.74
TEAM IOWA/IPROMOTEU	INSTRUCTIONAL SUPPLIES	\$1,360.36
UNGS KELLY	OFFICIAL/JUDGE	\$50.00
UNIVERSITY OF IA ATHLETIC DEPT	DUES AND FEES	\$400.00
VARSITY SPIRIT	INSTRUCTIONAL SUPPLIES	\$34.90
WALMART	INSTRUCTIONAL SUPPLIES	\$117.00
WALTON DE MARRO	OFFICIAL/JUDGE	\$65.00
WELTER STORAGE EQUIPMENT CO INC	INSTRUCTIONAL SUPPLIES	\$2,495.00
ZIO JOHNNO'S	INSTRUCTIONAL SUPPLIES	\$810.00

Fund Total: \$42,079.60

Grand Total: \$478,591.23

End of Report