

**APPLICATION AND CERTIFICATE FOR PAYMENT**

TO OWNER: Linn-Mar Community School District  
2999 10th Street  
Marion, Iowa 52302

PROJECT: 1211730

APPLICATION # Final  
PERIOD TO: 09/30/21  
PROJECT NOS: 1211730

Distribution to:

- Owner
- Const. Mgr
- Architect
- Contractor

FROM CONTRACTOR:

VIA ARCHITECT: Shive Hattery, Inc.

CONTRACT DATE: 03/08/21

Dryspace, Inc.

707 66th Avenue SW

Cedar Rapids, Iowa 52404

CONTRACT FOR: Linn Mar Aquatic Center

**CONTRACTOR'S APPLICATION FOR PAYMENT**

Application is made for payment, as shown below, in connection with the Contract.  
Continuation Sheet is attached.

1. ORIGINAL CONTRACT SUM-----	\$	412,407.00
2. Net change by Change Orders-----	\$	24,320.00
3. CONTRACT SUM TO DATE (Line 1 +/- 2)	\$	436,727.00
4. TOTAL COMPLETED & STORED TO DATE-\$ (Column G on Continuation Sheet)		436,727.00
<b>5. RETAINAGE:</b>		
a. <u>5</u> % of Completed Work	\$	
b. <u>5</u> % of Stored Material (Column F on Continuation Sheet)	\$	
Total Retainage (Line 5a + 5b or Total in Column 1 of Continuation Sheet-----	\$	436,727.00
6. TOTAL EARNED LESS RETAINAGE----- (Line 4 less Line 5 Total)	\$	414,890.65
<b>7. LESS PREVIOUS CERTIFICATES FOR PAYMENT</b> (Line 6 from prior Certificate)-----		
	\$	414,890.65
8. CURRENT PAYMENT DUE-----	\$	21,836.35
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6)	\$	

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner	\$24,320.00	
Total approved this Month		
TOTALS	\$24,320.00	
NET CHANGES by Change Order	\$24,320.00	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown therein is now due.

CONTRACTOR:

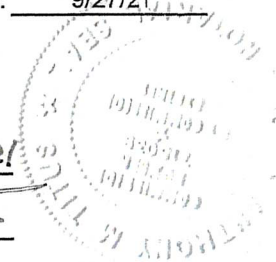
By: Lynn Price  
Lynn Price, President

Date: 9/27/21

State of: Iowa  
County of: Linn

Subscribed and sworn to before me this 27<sup>th</sup> day of September, 2021

Notary Public: Allyson M. Ste...  
My Commission expires: 02/12/23



**CERTIFICATE FOR PAYMENT**

In accordance with Contract Documents, based on on-site observations and the data comprising application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED ----- \$ 21,836.35

(Attach explanation if amount certified differs from the amount applied for. Initial all figures on this application and on the Continuation Sheet that are changed to conform to the amount certified.)

ARCHITECT:

By: [Signature]

Date: 11/12/2021

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner of Contractor under this Contract.

# CONTINUATION SHEET

ATTACHMENT TO PAY APPLICATION

APPLICATION NUMBER: Final

PROJECT:2021 Roof Repair for Aquatic Center

APPLICATION DATE: 27-Sep-21

Linn-Mar Community School District

PERIOD TO: 30-Sep-21

ARCHITECT'S PROJECT NO:

A Item No.	B Description of Work	C Scheduled Value	D Work Completed		F Materials Presently Stored (Not In D or E)	G Total Completed And Stored To Date (D + E + F)	H % (G/C)	I Balance To Finish (C - G)	Retainage
			From Previous Application (D + E)	This Period					
1	Vapor Barrier	\$ 36,997.00	\$ 36,997.00	\$ -	\$ -	\$36,997.00	100%	\$ -	
2	EPDM Membrane	\$ 86,538.00	\$ 86,538.00	\$ -	\$ -	\$86,538.00	100%	\$ -	
3	Accessories	\$ 31,522.00	\$ 31,522.00	\$ -	\$ -	\$31,522.00	100%	\$ -	
4	insulation	\$ 103,922.00	\$ 103,922.00	\$ -	\$ -	\$103,922.00	100%	\$ -	
5	Sheet Metal	\$ 16,900.00	\$ 16,900.00	\$ -	\$ -	\$16,900.00	100%	\$ -	
6	Labor	\$ 122,400.00	\$ 122,400.00	\$ -	\$ -	\$122,400.00	100%	\$ -	
7	Landfill	\$ 4,650.00	\$ 4,650.00	\$ -	\$ -	\$4,650.00	100%	\$ -	
8	Equipment Rental	\$ 7,555.00	\$ 7,555.00	\$ -	\$ -	\$7,555.00	100%	\$ -	
9	Wood Nailer	\$ 1,923.00	\$ 1,923.00	\$ -	\$ -	\$1,923.00	100%	\$ -	
10	Change Order Lower Roof Wall	\$ 24,320.00	\$ 24,320.00	\$ -	\$ -	\$24,320.00	100%	\$ -	
11		\$ -	\$ -	\$ -	\$ -			\$ -	\$ -
12		\$ -	\$ -	\$ -	\$ -			\$ -	\$ -
13		\$ -	\$ -	\$ -	\$ -			\$ -	\$ -
14						\$ -		\$ -	\$ -
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21						\$ -		\$ -	\$ -
22						\$ -		\$ -	\$ -
23						\$ -		\$ -	\$ -
24						\$ -		\$ -	\$ -
SUBTOTALS PAGE 2		436,727.00	\$ 436,727.00		-	436,727.00	100%		



## CERTIFICATE OF SUBSTANTIAL COMPLETION

PROJECT: 2021 Aquatic Center Roof Replacement


CONTRACTOR INFORMATION: Certificate Number: 01  
Date: March 02, 2021      Date: September 20, 2021

OWNER: Linn-Mar Community School District

ARCHITECT: Shive-Hattery, Inc.

CONTRACTOR: Dryspace Inc.  
707 66<sup>th</sup> Avenue SW, Cedar Rapids, IA

The Work identified below has been reviewed and found, to the Architect's best knowledge, information, and belief, to be substantially complete. Substantial Completion is the stage in the progress of the Work when the Work or designated portion is sufficiently complete in accordance with the Contract Documents so that the Owner can occupy or utilize the Work for its intended use. The date of Substantial Completion of the Project or portion designated below is the date established by this Certificate.

Shive-Hattery		Stephen Stewart	September 10, 2021
ARCHITECT (Firm Name)	SIGNATURE	PRINTED NAME AND TITLE	DATE OF SUBSTANTIAL COMPLETION

**WARRANTIES**

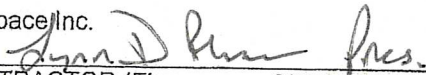
The date of Substantial Completion of the Project or portion designated above is also the date of commencement of applicable warranties required by the Contract Documents, except as stated below:

**WORK TO BE COMPLETED OR CORRECTED**

A list of items to be completed or corrected is attached hereto, or transmitted as agreed upon by the parties, and identified as follows:

The failure to include any items on such list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents. Unless otherwise agreed to in writing, the date of commencement of warranties for items on the attached list will be the date of issuance of the final Certificate of Payment or the date of final payment, whichever occurs first. The Contractor will complete or correct the Work on the list of items attached hereto within Fifteen (15) days from the above date of Substantial Completion.

The Owner and Contractor hereby accept the responsibilities assigned to them in this Certificate of Substantial Completion:

Dryspace Inc.		Lynn Price, President	9/23/2021
CONTRACTOR (Firm Name)	SIGNATURE	PRINTED NAME AND TITLE	DATE

Linn-Mar Community School District

OWNER (FIRM NAME)	SIGNATURE	PRINTED NAME AND TITLE	DATE
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ROOF MAINTENANCE WARRANTY

PROJECT: 1211730 – 2021 Aquatic Center Roof Replacement, Linn-Mar Community School District

This agreement between Linn-Mar Community School District, hereinafter referred to as OWNER, and Dryspace, Inc., hereafter referred to as CONTRACTOR, is entered into to provide maintenance on the roof of Aquatic Center, located at 3111 10th Street Marion, Iowa 52302, Marion, Iowa, for 2 years beginning September 10, 2021 and ending September 10, 2023.

For the purpose of this agreement, maintenance is defined as the repair of roof membrane and flashing defects, and the replacement of roof membrane and flashing components that threaten the viability of the roof system to keep the building free from externally caused leakage through the roof. Warranty shall include all materials and workmanship required to repair any defects that develop during the warranty period at no expense to the OWNER.

Specifically excluded from the responsibility of the CONTRACTOR under the terms of this agreement are any and all damages to said roof, the building or contents caused by the acts or omissions of other trades or contractors; lightning, winds in excess of a strong gale as defined by the Beaufort scale, hailstorm, flood, earthquake or other unusual phenomena of the elements.

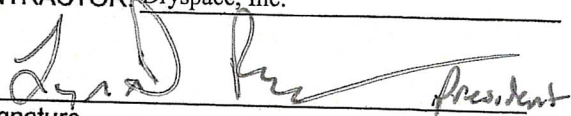
The component parts of this agreement are:

1. A yearly comprehensive inspection of the roof during which time all defects that need to be repaired and all components that need to be replaced will be identified by the inspector.
2. Should defects be found during inspection that are not covered by this agreement, the CONTRACTOR will notify the OWNER in writing as to the cause (who or what was responsible), and the estimate of the cost to return the roof to its condition before the problem occurred. Written approval to proceed with the work must be granted by the OWNER.
3. Completion of all repairs and replacement in a manner consistent with the highest standards of the roofing industry. Work shall be in compliance with the membrane manufacturer's written specifications and warranty, so as not to void warranty.
4. A follow-up inspection of the completed maintenance work.
5. Response within 24 hours of all requests for repair of leaks or other emergencies that are part of this agreement.
6. This maintenance warranty covers CAULKING for the listed project and shall be included along with the roofing warranty. The undersigned CONTRACTOR will repair or replace defective caulking work and other work damaged thereby during the warranty period at no expense to the OWNER. The following types of failures are considered defects: Leakage, hardening, cracking, crumbling, melting, shrinkage, running or staining adjacent work.
7. This maintenance warranty covers FLASHING for the listed project and shall be included along with the roofing warranty.
8. This maintenance warranty covers SHEETMETAL for the listed project and shall be included along with the roofing warranty.

OWNER: Linn-Mar Community School District

CONTRACTOR: Dryspace, Inc.

\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name and Title

Lynn Price President  
\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Date

9/23/2021  
\_\_\_\_\_  
Date



# Linn-Mar Board of Education Operations Manual

*A Guide for Board  
Operations and Functions*



2999 N 10th Street  
Marion IA 52302

Created: 1993  
Revised: 2021

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# Introduction

In order to provide the necessary and appropriate leadership for the district, the Linn-Mar Community School District Board of Education, both collectively and individually, is committed to governing as a professional board of directors. This means a commitment to the principles and practices of professional governance; the sharing of a common understanding of board policies, practices, procedures, and principles; a focus on continuous learning and improvement; and a willingness to serve as a model of effective, **moral ethical** leadership for students, staff, and the community.

The *Board Operations Manual* explains the duties, structure, and responsibilities of the Linn-Mar Community School District Board of Education as per the Iowa Association of School Boards (IASB) recommendations and State of Iowa Code. This manual is a living document and is in no way meant to be the final word as to how the board will direct its business. Each iteration of the board will reflect the personality of that board and may result in additions or revisions.

## Board Authority

Board authority is derived from State of Iowa Code, which includes many different powers and duties of school boards. As a corporate body, the board may transact business only with a quorum of its membership present during a regular or special meeting.

According to *Dillon's Rule*, a local school board can only do what it is authorized to do per code, as opposed to home rule where action can be taken unless it is stated in code that the action is not allowed. The Linn-Mar Community School District Board of Education policy manual includes a listing of the school board's general powers and duties in Policy Series 200-Board of Directors.

The following is a partial listing of the duties and powers the board has the authority to carry out and reflects the authority vested in local school boards:

1. Determine major educational needs and develop plans to meet those needs.
2. Fix time and place of regular and special meetings.
3. Fill, by appointment, any vacancies occurring between elections.
4. Employ a superintendent.
5. Approve the employment and salaries of administrators/managers, teachers, principals, other licensed personnel, and staff members.
6. Terminate the contract or immediately discharge any employee subject to the provisions of any applicable law and/or board policy.
7. Become members of the Iowa Association of School Boards and pay dues.
8. Utilize funds received through gifts, devises, and bequests in the general or schoolhouse funds, unless limited by the terms of the grant.

9. Employ legal counsel and bear the cost of litigation.
10. Allow all just claims against the school corporation.
11. Insure against loss of property.
12. Appoint a board secretary and treasurer.
13. Require bonds for individuals having custody of school corporation funds, funds from extra-curricular activities or other sources, and pay premiums from the general fund.
14. Determine district attendance centers and the particular school each student will attend.
15. Maintain attendance centers based upon the needs of school-age students and include in the educational program additional courses, subjects, or activities that fit the needs of the students.
16. Provide transportation services.
17. Acquire, hold, convey, lease, rent, and manage property; real and personal.
18. Incur indebtedness when authorized by the voters of the school corporation.
19. Make rules for its own government.
20. Maintain adequate administration, school staffing, personnel assignment policies, teacher qualifications and licensing requirements, facilities, equipment, grounds, graduation requirements, instructional requirements and materials, maintenance procedures, and policies on extra-curricular activities.
21. Expel students from school for violation of rules established by the board or when their presence is detrimental to the best interests of the school.

## Board Member Responsibilities

Board member responsibilities include attending board meetings; being prepared in advance by reading agendas, supporting documentation, presentation materials, and other informational documents; seeking information that is necessary; and suspending all judgement prior to the decision-making process at the board table. Effective board members also resist presenting surprises at board meetings by abiding by board policies and rules and holding off personal decisions until all evidence is in and all board discussion has occurred.

The board is made up of seven members of the Linn-Mar Community School District with each member assuming responsibility for the total board's effectiveness, functions, and efficiency. No individual can speak for or act on behalf of the board. The board acts only when a quorum is present and when a majority of that quorum reaches a decision. The Linn-Mar Community School District Board of Education strives to be unified and professional at all times. This does not mean, however, that board members cannot have disagreements or open discussions about district issues. Open discussions are encouraged in order to thoroughly examine each issue. Disagreements are to be handled in a respectful manner at all times with board members displaying courtesy for each other and for differing points of view.



# Board Ethics

Board member actions, verbal and nonverbal, reflect the attitudes and beliefs of the Linn-Mar Community School District. Therefore, board members must conduct themselves in accordance with the Iowa Association of School Board's Code of Ethics as outlined in Policy Series 200.

Board members must avoid conflicts of interest, either real or perceived, related to serving on the board. Both Iowa law and board policy describe limitations placed on board members in carrying out their duties, but these limitations cannot address every situation where a conflict of interest may arise. Therefore, board members must be vigilant in avoiding any actions that may be perceived as creating a conflict of interest **and disclose any conflicts of interest on an annual basis by completing the district's School Board Conflict of Interest form (Policy 202.7-E).**

~~(Example: Endorsing other board member candidates during school board elections.)~~

Iowa law states that all actions of the board shall be conducted in public, while at the same time the law allows for specific situations and procedures wherein the board may meet in private to discuss confidential information. Board members are privy to confidential information in the course of their service to the district. It is imperative that each board member respect the confidentiality of information shared with them.

**Refer to Policy 202.7-School Board Conflict of Interest and 202.7-E-School Board Conflict of Interest Form for additional information.**

## Board Guiding Principles

1. Deliberate in many voices, but govern in one voice.
2. Cultivate a sense of group responsibility with the understanding that it is the board, not the staff or administration, which is responsible for excellence in governance.
3. Be an active part of the district's leadership team striving to lead the district through a clear mission statement, an articulated vision for the district, shared and commonly understood goals, broad and clearly written policies, and continual monitoring of the performance of the schools and students.
4. Be willing to hold itself to the highest standards of excellence in governance and professional responsibility, including a willingness to hold individual board members and the board as a whole accountable for its actions.
5. Continually monitor its own processes, performance, and progress.
6. Vigorously and intelligently advocate for the district and its students on the local, state, and national levels.
7. Commit both individually and collectively to being well-informed and educated on local, state, and national educational issues, initiatives, and practices.
8. Regularly communicate as one voice while exercising confidentiality, when appropriate,

- to all stakeholders about district performance, direction, initiatives, issues, and ideas.
9. Formally and informally recognize and celebrate school, staff, and student success.
  10. Insist on the pursuit of excellence on the part of all with a role in the district; staff, students, and board members.
  11. Always strive to act in the interest of what is best for all students, believing that all students can learn and succeed at a high level.
  12. Serve as a model of positive, professional, and ethical conduct **in an open and transparent manner.**

## Board Meetings

### Work Session Agenda Format:

- 100: Call to Order and Determination of a Quorum
- 200 Adoption and/or Revision of the Agenda
- 300: Informational Reports and Discussion
- 400: Adjournment

### Work sessions will have the following characteristics:

1. No formal board action or decisions will take place;
2. Discussions are informational or for data analysis;
3. Are for building board member awareness and learning; and
4. Are for board member team building.

### Regular Session Agenda Format:

- 100: Call to Order and Determination of a Quorum
- 200: Adoption and/or Revision of the Agenda
- 300: Audience Communications
- 400: Informational Reports and Discussion
- 500: Unfinished Business
- 600: New Business
- 700: Consent Agenda
- 800: Board Communications and Calendar
- 900: Adjournment

The board shall make rules for its own governance. The board may make and enforce reasonable rules for the conduct of its meetings to ensure they are orderly and free from interference or interruption by spectators. The Linn-Mar Board of Education has chosen to follow *Robert's Rules of Order, Revised* latest edition as a procedural model for operational purposes.

Board meetings shall be held at a place accessible to the public and at a time reasonably convenient to the public, unless such a place or time is impossible or impractical which shall be stated in the minutes. The public may use cameras or recording devices at any open meeting.



Board meetings are held IN the public, but not FOR the public. Meetings are to conduct district business in an open and transparent manner, not to engage in dialogue with the public. Public comments are allowed at the start of each open, regular meeting; but not during the order of business. Guidelines for addressing the board are outlined in the agenda and shared with the public prior to the audience communications section of the meeting. The guidelines for public participation in board meetings are also found in ~~Policy Series 200~~ [policies 204.7-Board Meeting Agendas and 204.9-Public Participation in Board Meetings.](#)

When participating in discussion, the board directs the superintendent and administration. The directive will be restated for clarity and conciseness by the board president to ensure there is common agreement and consensus from the entire board. Board meetings should allow business to be transacted efficiently, protect individual rights, and maintain the working relationship among members.

The role of the superintendent during board meetings will be that of advisor and facilitator in helping the board work through its business and reach decisions. As the chief executive officer of the district and the chief advisor to the board, the superintendent will provide timely information, materials, adequate time for deliberation, and recommendations given prior to board meetings and prior to board deliberations when making decisions. Reports, presentations, and documentation will follow a format developed by the superintendent and shared with the board.

Reports to the board during regular meetings will be concise, ~~and will not exceed 15 minutes, including questions.~~ Written materials will be provided to the board in advance for their review and preparation for the presentations. All visual aids will be of a quality that the board and audience can view from their seats. The preferred format is electronic projection.

The board is to come prepared and ready to participate in the discussion and decision-making process. The board will also be given advance notice as to whether or not presentations or reports are for information only or if they are for deliberations and/or action.

## Board Committees and Advisories

The administration will inform all board advisory committees of requirements as stated in legislation regarding open meetings. The board will be aware that any committee that it appoints is under the open meetings law requirement. Care will be taken to assess whether a committee already functioning in the district may be used for the purposes of the board, rather than the creation of a new committee.

Board members are encouraged to be active on committees and other advisory groups that function within the district. Board member participation is to be advisory only, since it might be

construed that a board member may have the potential to persuade others with their vote. Therefore, no board member will be a committee chairperson or a voting member of a committee or advisory group within the district.

## Schedules

It is important for board members to be actively involved in board events to not only learn about the district, but to also show support for Linn-Mar and advocate for the district. Therefore, board members are expected to attend board meetings, school and site visits, special meetings for community input, and other meetings and events throughout the district and community. A rotating schedule will allow board members to attend Marion City Council meetings in order to facilitate communication between the two entities.

Schedules for board meetings, school/site visits, and committee/advisory meetings are developed at the beginning of each school year. Ongoing calendars can be found at the end of each board meeting agenda and on the board/policy website (<http://.policy.linnmar.k12.ia.us/>).

## Policy

A school board fulfilling its policy-making duties fulfills the board's most important function. Written board policy represents that the school district is managed in a business-like manner and informs all stakeholders of the board's intent, goals, and objectives. Written policy fosters stability and continuity whenever board members or district personnel changes. Written policy also disarms critics by providing clear-cut, thoroughly researched, and planned solutions.

Written board policies have the same force and effect in a school district as Iowa laws have in the state, and as federal laws have in the country.

Iowa Code places the authority to develop and adopt policy for a school district in the hands of the school board. The Iowa State Department of Education Educational Standards, which set the requirements for an accredited education program, require the board to adopt and maintain a board policy manual. The district's board policy manual can be accessed via the district's school/policy website (<http://policy.linnmar.k12.ia.us/>).

If an issue or area of concern is one that only the board can change and determine, it is policy. If an issue or area of concern is one that the administration can change, it is administrative regulation.

### **Policy Development**

The policy development process has been designed so that several sources of input can be given to the board regarding review and development of its policies. By law, each board policy must be reviewed at least once every five years.



A policy committee made up of board members, the superintendent, and key administrators will be used to review board policies and make recommendations to the board. The policy committee will meet regularly during the school year to review the policies. It will be the duty of this committee to review the policies for accuracy, content, appropriateness, timelines, and necessity. In order to accomplish this, each member of the committee will review current board policies and recommendations for changes that have been communicated to the district by the Iowa Association of School Boards (IASB), along with state and federal requirements and changes.

Policy committee recommendations will be presented to the board during regular meetings for discussion, first and second readings, and adoption upon board approval.

## Relationships and Communications

There are two types of communications that board members will incur, internal (owner/district) and external (customer/patron). Board members should assess all communications and be aware of which type of communication they are being engaged in at all times.

*As board members engage in communication with various patrons, they should remember that patron concerns should be addressed from the lowest level of authority first and then, if not satisfied, patrons should work upward to the superintendent or board level. (Ex: teacher>building administrator>human resources>superintendent>board) Patrons should be directed to contact the superintendent regarding an issue only after exhausting the appropriate channels of communication.*

### **Internal Communications and Relationships**

Board members are encouraged to interact and communicate with staff members as a means of gathering information and knowledge of the workings of the district. If staff members want board members to solve managerial issues, or when a board member is not satisfied with staff performance, these situations should be directed to the superintendent for resolution, supervision, or evaluation.

Board members need to separate their role as a board member from their role as a parent/patron when dealing with staff and administrators and should clarify which role they are in when communicating with staff and administrators. Administrators or staff may be hesitant to speak openly with board members for fear of retribution, especially if the conversation includes a complaint about district operations.

Staff should reflect respect for the district and its employees when stating concerns or opinions, and their concerns and opinions should be based on factual information not rumors. When listening to and speaking with staff members, conversations should be mutually respectful of the district, board, and all employees. All board members and staff are governed by the board

policies which prohibit retaliation, bullying, or discrimination.

The board needs to exercise caution in personnel issues. Board members must always keep in mind that they are the final hearing officers in any personnel dispute. If a board member becomes involved in a personnel issue, they may need to recuse themselves from a hearing due to the possibility of being prejudiced. For that reason, personnel issues should be handled only by administrators hired for that purpose.

Any discussion by the board that could be interpreted as evaluative must be done in a meeting with the employee given the opportunity to be present to give their side of the issue, as well as the option of a closed session. Staff members may try to have board members solve problems outside board meetings, or a board member may not be satisfied with staff performance, but according to board procedure and policy these situations should be directed to the superintendent for resolution, supervision, or evaluation.

The board and staff members (certified and classified) will engage in a variety of communication strategies. Board retreats are one option that has been successfully used to further interaction and open communication.

### **Internal Board and Superintendent Relationship/Communications**

Because of the relationship the board and superintendent must have to conduct the work of the district, it is imperative that they keep each other informed of current issues. There should not be surprises at board meetings from either the board or superintendent. Board members will refrain from lobbying efforts with other board members outside of board meetings.

The superintendent will publicly support the Linn-Mar Board of Education and its decisions and the board will publicly support the superintendent and his/her decisions. Additionally, each board member is expected to publicly support decisions reached by the board as a whole, even if the board member voted with the minority on an issue.

Board members will be charged with maintaining relationships within the board in accordance with board standards per the Iowa Association of School Boards (IASB).

### **External (Public) Relationships and Communications**

*Reminder: There are two types of communications that board members will incur, internal (owner) and external (customer). Board members should assess and be aware of which type of communication they are being engaged in at all times. Patron concerns should be addressed from the lowest level of authority first and then, if not satisfied, patrons should work upward to the superintendent or board level. Patrons should be directed to contact the superintendent regarding an issue only after exhausting the appropriate channels of communication.*

On controversial issues, the board will have a public statement drafted by the superintendent that board members may utilize for any public comment that needs to be made. As individuals, board members should support the actions and statements of the board. It is board procedure

that the entire board be polled by the president prior to any public statement being made on behalf of the board as a whole. The board president shall be the official spokesperson for the board. The superintendent may also speak publicly on behalf of the board. If any board member wishes to address a point of view before the public, it is imperative that each board member communicates that they are speaking from their own personal viewpoint versus a board viewpoint **in such a manner that does not contradict the work of the board or district.**

***Per board policy 1001.2-News and Media Relations: The board president shall be the spokesperson for the board and the superintendent shall be the spokesperson for the district. It shall be the responsibility of the board president and superintendent to respond to inquiries from the media about the district. Members of the news media seeking information about the district shall direct their inquiries to the superintendent [or designee]. The superintendent [or designee] shall accurately and objectively provide the facts and the board's position in response to inquiries from the news media about the district.***

The board's strategic planning process will include a plan for district public relations and **marketing communications** developed by and implemented by the administration and relevant departments.

**Refer to policies 1001.2-News and Media Relations, 403.35-Social Networking, and 403.42-Employee Expression for additional information.**

**Finance/Audit Committee Commission**

**Statement of Purpose:**

The purpose of the committee is to assist the board in discharging its responsibilities relating to financial oversight, budget, internal controls, financial policies, capital structure, and other related matters while helping to achieve the mission and vision of the Linn-Mar District. The Finance/Audit Committee shall serve a dual purpose for the district.

1. Finance Role:
  - a. Oversee the financial affairs of the district
  - b. Review and make recommendations to the board regarding district financial affairs and policies.
2. Audit Role: Oversight of external and internal audit processes

**Committee Composition:**

The committee shall be made up of up to three members of the Board of Education, the chief financial officer/board treasurer, and the board secretary. Ad hoc members shall be appointed on an as needed basis for matters of technical expertise or tacit knowledge. Committee members must be capable of:

- Meeting on a quarterly basis (minimum);
- Demonstrating a willingness to learn about school finance;
- Broadly understanding the fiduciary responsibility as it relates to public funds;
- Objectively evaluating proposed finance related decisions;
- Asking questions that are representative of the understanding of the rest of the board;
- Bringing a positive, constructive attitude and well-developed emotional intelligence to work with the board; and
- Effectively communicating financial related matters to the broader constituency.

**Responsibilities:**

- Monitor the district budget: 1) ensure funds are spent to accomplish strategic initiatives as described within the Strategic Plan and 2) ensure the district is operating in a fiscally sustainable manner;
- Regularly review financial and operational metrics;
- As appropriate, provide reports and guidance to the full board;
- Review and recommend major district expenditures;
- Ensure compliance of existing policies and/or recommend new policies as it relates to the finance and business operations of the district;
- Provide analysis and guidance related to capital and debt issuances;
- Analyze financial implications of any proposed or enacted legislation by local, state, or federal governments; and
- Confer with the independent auditor to ensure the financial affairs of the district are in order.



**Policy/Governance Committee Commission**

**Statement of Purpose:**

The Board of Education for the Linn-Mar Community School District calls for the board to appoint a Policy/Governance Committee to review and enact board policy to provide broad rules and guidelines governing the school district operations, which are developed within the overall framework of state laws and regulations as well as help to achieve the mission and vision of the Linn-Mar District and to train board members in their work and the work of the district.

The expected outcome from the work of this committee will be to ensure an effective board and district by guaranteeing that the board:

- Has a current policy manual that is responsive to all federal and state laws and requirements;
- Has a policy manual that is responsive to local community needs;
- Has a three-year policy manual review cycle;
- Has a board learning agenda;
- Communicates policy changes to the broader constituency; and
- Systematically engages in policy setting, enforcement, and execution.

**Committee Composition:**

The committee shall be made up of up to three members of the Board of Education (to be appointed at the annual organizational meeting): the board secretary, the superintendent, and staffed by a member of the executive office. Ad hoc members shall be appointed on an as needed basis for matters of technical expertise or tacit knowledge. Committee members must be capable of:

- Meeting on a quarterly basis (minimum);
- Objectively evaluating proposed policy changes;
- Identifying, cultivating, and brainstorming avenues of policy development;
- Bringing a positive, constructive attitude and well-developed emotional intelligence to work with the board;
- Demonstrating an eagerness to become an expert in high-impact governance; and
- Assuming responsibility for developing board policies.

**Commission:**

The committee is commissioned to develop the board by focusing on:

- Policy:
  - Policy Setting (Governance):
    - Lead the board in regularly reviewing and updating the board policy manual
    - Help initiate policy design
  - Policy Management (Stewardship):
    - Help manage policy library
    - Maintain policy history
  - Policy Enforcement and Execution (Operational Implementation):
    - Conduct policy performance review and audit
- Board Learning:
  - Create and maintain board learning plan
  - Survey individual board member needs
  - Stay abreast of staff learning plan and district strategic efforts related to staff development

- Knowledge:
  - Design and oversee a process of board orientation to include providing information prior to election as a board member and, when needed, during the first cycle of board activity for new board members.
  - Design and implement an ongoing program of board information and education.
- Effectiveness:
  - Lead the periodic assessment of the board's performance. Propose, as appropriate, changes in board structure, roles, and responsibilities.
  - Provide ongoing counsel to the board president and other board members on steps to take to enhance board effectiveness.
  - Regularly review the board's practices regarding member participation, conflict of interest, confidentiality, etc., and suggest improvements as needed.
  - Periodically review and update the board's policies and practices.
  - Conduct meeting analysis on an as needed basis.

**Career and Technical Education Advisory Committee Commission**

**Statement of Purpose:**

The Board of Education for the Linn-Mar Community School District calls for the board to appoint a Career and Technical Education Advisory Committee to make recommendations to the board in the areas of career and technical education (CTE). The expected outcome of this committee will be to ensure that students are exposed to a well-rounded experience in the career and technical education fields as well as help to achieve the mission and vision of the Linn-Mar Community School District.

**Committee Composition:**

The committee shall consist of members representing parents, teachers, administrators, and representatives from the community, which may include representatives of business, industry, labor, community agencies, higher education, or other community constituents. To the extent possible, committee membership shall have balanced representation with regard to race, gender, national origin, and disability.

**Commission:**

The committee is commissioned to:

1. Receive updates from administration and teaching staff in regard to the Linn-Mar Career and Technical Education programs;
2. Discuss and explore the current programs, as well as look at potential enhancements and changes to the curriculum and course offerings;
3. Align and implement initiatives from the state and federal levels;
4. Assess progress toward strategic initiatives as outlined in the district's *Strategic Plan*;
5. Assess progress at the department, programmatic, and student level and make recommendations for future growth opportunities;
6. Report areas of strength and continued areas of focus, as appropriate, to the board and community;
7. Utilize the expertise of the counseling department in order to better facilitate student Pathways to Success within the CTE framework; and
8. Work with community partners (MEDCO, Marion Chamber of Commerce, City of Marion, Kirkwood Community College, Marion Independent School District, Iowa BIG, etc.) to provide comprehensive and coordinated opportunities for Linn-Mar students to experience and pursue future Pathways to Success within the CTE framework.

**School Improvement Advisory Committee Commission**

**Statement of Purpose:**

The Code of Iowa (280.12) calls for the board to appoint a School Improvement Advisory Committee (SIAC) to make recommendations to the board. This committee is charged to make recommendations to the board in several areas based on analysis of the needs assessment data. The board will use these recommendations to adopt annual improvement goals that will help to achieve the mission and vision of the Linn-Mar District.

**Committee Composition:**

The advisory committee shall consist of members representing students, parents, teachers, administrators, and representatives from the community which may include representatives of business, industry, labor, community agencies, higher education, or other community constituents. To the extent possible, committee membership shall have balanced representation with regard to race, gender, national origin, and disability (280.12(1)). Ad hoc members shall be appointed on an as needed basis for matters of technical expertise or tacit knowledge.

**Commission:**

The committee is commissioned to make recommendations to the board to help determine the following:

1. Major educational needs;
2. Student learning goals;
3. Long-range and annual improvement goals that include, but are not limited to, the state indicators that address reading, mathematics, and science achievement;
4. Desired levels of student performance;
5. Progress toward meeting the goals set out in paragraphs “b” through “d” as referenced in the Iowa Code; and
6. Harassment or bullying prevention goals, programs, training, and other initiatives (280.12(2)).

In addition, the board shall consider recommendations from the School Improvement Advisory Committee to infuse character education into the educational program (280.12(3)).

At least annually, the School Improvement Advisory Committee shall also make recommendations to the board with regard to, but not limited to, the following:

1. Progress achieved with the annual improvement goals for the state indicators that address reading, mathematics, and science;
2. Progress achieved with other locally determined core indicators; and
3. Annual improvement goals for the state indicators that address reading, mathematics, and science achievement.





# Fundraising Request Form

**RECEIVED**

By: SO Date: 12/10/21

Completed request forms are to be submitted to the business office per the following schedule:

Request Due	Board Meeting Date	Activity Start Date
By 1st day of School	First meeting in Sept	Day after approval meeting
By last day before Thanksgiving break	December meeting	Day after approval meeting
By last day before spring break	First meeting in April	Day after approval meeting

**Important Notes:** A fundraising project summary is due six weeks after the activity ends. Proceeds should be spent during the year the funds are raised. All groups are required to submit a request for each activity to the business office specifying how all fundraising proceeds are to be spent.

School Name Bowman Woods Sponsoring Group \_\_\_\_\_  
 Contact Name Sara Krause Contact Phone 319-310-0590  
 Contact E-Mail skrause@linnmar.k12.ia.us District Account 10-0436-1013-102-8039  
000612

<b>Description of Activity</b>	
<i>*all information must be provided in order to be approved*</i>	
Fundraising Activity	<u>Artsonia digital portfolio with online</u>
Activity From/To Dates	<u>2021-2022 school year art sales</u>
Estimated Proceeds	<u>\$300</u>
Purpose and Use of Funds (MUST BE SPECIFIC)	<u>Art supplies: yarn, drawing paper, clay, glazes, crafting supplies, paint, and other supplies that exceed regular budget.</u>

*\* I am approving that this request is necessary to provide funds for the purpose described above.*

Building Admin Tina J. Masch 12/9/21  
 Signature of Approval Date

Office Use Only		Summary Due Date:
Business Office Review:	<u>Caitan Hensel</u> <u>12/10/2021</u> Date	_____
School Board Review/Approval:	_____ Date	_____

*To be submitted to Jan 10 2022 Board Mtg. - ~~01~~ 12-16-21*



## Business Procedures - Fiscal Management

### Policy Title: Transfer of Funds Code 801.3

The board may loan monies between funds through an official board resolution. The resolution must specify the funds from which, and to which the transfer will be made. The board will exercise this authority judiciously.

A temporary transfer, a loan from one fund to another, will be at a rate of interest consistent with the state rate. The loan will be paid off by October 1st of the following fiscal year to which the loan was made.

~~When the necessity for a fund has ceased to exist, the balance may be transferred to another fund or account by board resolution. School district monies received without a designated purpose may be transferred in this manner. School district monies received for a specific purpose or upon vote of the people may only be transferred by board resolution when the purpose for which the monies were received has been completed. Voter approval is required to transfer monies to the general fund from the capital projects fund and debt service fund.~~

When the necessity for a fund has ceased to exist, or when the board is given authority to transfer categorical or other funds and has met the conditions of exercising the authority, the balance may be transferred to another fund or account or the expenditures may be directed by board resolution, as required. School district monies received for a specific purpose or upon vote of the people may only be transferred by board resolution when the purpose for which the monies were received has been completed or when authority to exercise local discretion to expend funds flexibility has been granted. Voter approval is required to transfer monies to the general fund from the capital projects fund and debt service fund unless state authority allows such a transfer without a vote.

~~If all requirements for district use of funds calculated under the teacher leadership supplement are met and funds remain unexpended and unobligated at the end of the fiscal year, the district may transfer all or a portion of the remaining funds into the district's flexibility account in accordance with law.~~

The district may choose to request approval from the School Budget Review Committee (SBRC) to transfer funds to make a program whole, prior to its elimination.

It is the responsibility of the board secretary [or designee] to make recommendations to the superintendent and the board regarding loans and transfers and to provide supporting evidence for the transfer.

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Adopted: 6/70

Reviewed: 10/12; 5/15; 12/18

Revised: 7/10; 12/13; 9/21

Related Policy (Code#): 801.2; 801.4

Legal Reference (Code of Iowa): §§ 24.21-22; 257.10; 279.8; 279.42; 298A; 289 IAC 6

IASB Reference: 701.2



## Business Procedures - Fiscal Management

### Policy Title: General Fund Reserves and Fund Balance Reporting Code 801.4

~~Line Item Budget:~~ **General Fund Budget:** The district shall prepare an annual five-year general fund budget forecast that includes estimates of unspent authorized budget (spending authority) as well as restricted, assigned and unassigned fund balances available at the end of each fiscal year. The estimates shall be prepared utilizing scenarios for likely State Supplementary Assistance (SSA) rates and enrollment projections. The projections shall include estimates of property tax rates and income surtax rates, if applicable.

The treasurer shall report monthly to the school board as to actual revenue and expenditures for the month and year-to-date, as compared to budgeted revenues and expenditures and compared to historical revenues and expenditures (both in dollar amounts and percentages) for each fund maintained by the district. The treasurer shall provide context with respect to current year variances between budgeted and historical revenues and expenditures.

A contingency reserve will be established at 0.2% of budgeted general fund expenses at the beginning of each fiscal year to provide for unanticipated expenditures of a non-recurring nature, to meet unexpected minor increases in service delivery costs, and to pay for needs caused by unforeseen emergencies.

**Financial Metrics:** The district is committed to the following financial metrics:

- A. Solvency Ratio\*: Maintaining a combined unassigned and assigned general fund balance that is at least 7% of annual revenue (actual or anticipated). The current year's cash reserve levy and before staffing and other spending decisions are finalized. The district will take reasonable steps to achieve a total general fund balance at least equal to its unspent authority. This enables the district to cash flow its legal spending limit.
- B. Unspent Authority: Maintaining an unspent authority balance of not less than 7% of that year's annual expenditures. The current year's projected balance will be discussed with the board before staffing and other spending decisions are finalized for the succeeding year. The district will measure attainment of these goals as of June 30<sup>th</sup>, but only after completion of the certified annual report.

**Modified Supplemental Amount:** The district shall solicit from the School Budget Review Committee (SBRC) additional Modified Supplemental Amount (spending authority) where it may be available for items such as Special Education deficit,

increasing enrollment, budget guarantee, open enrollment not on prior year count, English Language Learner (ELL), and any other lawful purposes. The board shall be provided a resolution to approve the maximum request authorized. Any award of Modified Supplemental Amount may be levied as a cash reserve levy, in full, in the next available budget year. For recurring program deficits that are predictable and estimable, the district shall levy in advance for the immediately succeeding year as part of the general cash reserve levy if the deficit causes the estimated assigned and unassigned to fall below the minimum required. Grants of spending authority not funded by the state or other sources may ultimately be levied against property taxes.

**Fund Balance Reporting:** Financial reporting for the balances in the district's governmental funds is based on Governmental Accounting Standards Board (GASB) Statement 54, Fund Balance Reporting, and Governmental Fund Type Definitions.

Fund balance refers to the difference between assets and liabilities in the governmental funds balance sheets. GASB Statement 54 establishes a hierarchy that is based on, "the extent to which the government is bound to honor constraints on the specific purpose for which the amounts in those funds can be spent."

The governmental funds can have up to five fund balance classifications. The classifications are defined below from most to least restrictive.

1. Non-spendable Fund Balance: Includes amounts that cannot be spent because they are either: (a) Not in spendable form or (b) legally or contractually required to be maintained intact. This includes items not expected to be converted to cash, including inventories and prepaid expenses. It may also include other property acquired for resale and the principal of a permanent fund.
2. Restricted Fund Balance: Should be reported when constraints placed on the use of resources are either: (a) Externally imposed by creditors, grantors, contributors, or laws or regulations of other governments or (b) imposed by law through constitutional provisions or enabling legislation. This includes categorical balances.
3. Committed Fund Balance: Reflects specific purpose pursuant to constraints imposed by formal action of the board. Such constraints can only be removed or changed by board action.
4. Assigned Fund Balance: Reflects amounts that are constrained by the government's intent to be used for specific purposes but meet neither the restricted nor committed forms of constraint. Unless the amount is negative, the assigned fund balance is the residual classification for the governmental funds other than the general fund. If the amount is negative, then the residual amount is shown as unassigned.



5. Unassigned Fund Balance: The residual classification for the general fund only. As noted above, if a negative residual amount exists in other governmental funds, then the amount is reported as unassigned.

The board authorizes the chief financial officer to assign general fund balance amounts for specific purposes in compliance with GASB 54.

\*Solvency Ratio Calculation: 
$$\frac{\text{Unassigned} + \text{Assigned Fund Balances}}{\text{General Fund Revenues} - \text{AEA Flow Through}}$$

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Adopted: 12/13

Reviewed: 12/18

Revised: 5/15

Legal Reference (Code of Iowa): §§ 257.31(4); 279.8; 291; 297.22-25; 298; 298A

IASB Reference: 701.3; 701.4



## Business Procedures - Fiscal Management

### Policy Title: Inventory and Fixed Assets Code 801.6

For insurance purposes, ~~an~~ a perpetual inventory of the furniture, equipment, and other non-consumable items other than real property of the school district will be ~~conducted annually~~ maintained under the supervision of the superintendent [or designee]. ~~This report will be filed with the board secretary.~~

In addition, a separate fixed asset listing will be maintained for all governmental funds, in accordance with GASB 34. All fixed assets, both tangible and intangible, are accounted for at cost, or if cost is not determinable at estimated cost. Donated fixed assets are recorded at estimated fair market value at the time received. Tangible fixed assets include buildings, land, land improvements, artwork, construction in progress, and machinery and equipment. Machinery and equipment with a historical cost equal to or greater than \$5,000, will be capitalized. All listed fixed assets will be depreciated over the useful life of each fixed asset per the schedule listed below.

Class Description	Useful Life
Buildings	50 years
Site Improvements	20 years
Outdoor Equipment	20 years
Roof Replacements	20 years
Audiovisual Equipment	10 years
Machinery and Tools	15 years
Computers	5 years
Communications Equipment	10 years
Furniture and Accessories	20 years
Licensed Vehicles	8 years
Athletic Equipment	10 years
Custodial Equipment and Appliances	15 years
Musical Instruments	10 years

Intangible fixed assets are defined as assets that are identifiable, lack a physical substance, have an initial useful life extending beyond a single reporting period, and cost more than \$175,000. Examples include easements, patents, trademarks, copyrights, and computer software that is purchased, licensed, or internally generated. If the asset is generated internally, cost will include efforts of staff members or independent contractors to plan, develop, and implement the asset. Intangible fixed assets will be considered capital assets for financial reporting purposes and depreciated over the estimated useful life of the asset using the straight-line method.

All equipment used by employees or students to meet the educational mission of the district must be tagged in a manner to identify them as permanent property of the Linn-Mar Community School District.

Nutrition Fund fixed assets with a historical cost equal to or greater than \$500 will be capitalized and depreciated over 12 years. Computer and technology assets purchased by the Nutrition Fund will be depreciated over five years. A straight-line depreciation method will be used, and assets will be depreciated for a full year in the year of acquisition. An annual inventory will be maintained on consumable property within the Nutrition Services program.

It is the responsibility of the superintendent [or designee] to develop a process for implementation of this policy.

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Adopted: 7/03

Reviewed: 7/10; 5/15; 12/18

Revised: 10/12; 12/13; 12/19; 6/21

Legal Reference (Code of Iowa): §§ 257.31(4); 279.8; 297.22-25; 298A

IASB Reference: 802.4



## Business Procedures - Income

### Policy Title: Local, State, Federal, and Miscellaneous Revenue Code 802.1

Revenues of the school district are received by the board treasurer [or designee]. Other persons receiving revenues on behalf of the school district will promptly receipt the money and deposit the money in a timely manner.

Revenue, from whatever source, is accounted for and classified under the official accounting system of the school district. It is the responsibility of the board treasurer to deposit the revenues received by the school district in a timely manner. To aid the process of collecting revenues, ACH payments, ~~for school fees, tuition, and insurance payments for retirees will be allowed and any other payments due to the district~~ credit card payments, and other electronic payment systems may be allowed on certain payments due to the district. School district funds from all sources will not be used for private gain or political purposes.

Tuition fees received by the school district are deposited in the general fund. The tuition fees for preschool through 12th grade during the regular academic school year are set by the board based upon the recommendation of the superintendent [or designee] in compliance with current law. Tuition fees for summer school are set by the board prior to offering the program.

The board may charge materials fees for the use or purchase of educational materials in accordance with state code. Materials fees received by the school district are deposited in the general fund. It is the responsibility of the superintendent [or designee] to recommend to the board when materials fees will be charged and the amount of the materials fees.

Rental fees received by the school district for the rental of school district equipment or facilities are deposited in the general fund. It is the responsibility of the superintendent [or designee] to recommend to the board a fee schedule for renting school district property.

The board grants the superintendent [or designee] the authority to contract with a collection agency to collect non-sufficient funds (NSF) checks and unpaid student fees. The use of a collection agency must be communicated to all Linn-Mar patrons in accordance with all state and federal Laws.

Proceeds from the sale of real property are placed in the Physical Plant and Equipment Levy (PPEL) fund. ~~However, following a properly noticed public hearing, the board of directors may elect to deposit proceeds from the sale of real property or buildings into any fund under the control of the school corporation. Notice for the public hearing must be published in a newspaper of general circulation within the district not less than 10 and no more than 20 days prior to the proposed public hearing. Notice of the public hearing must include the date, time, and location of the public hearing and a description of the proposed action.~~ The proceeds from the sale of other school district property are placed in the general fund.

~~The board may claim exemption from the law prohibiting competition with private enterprise for the following activities:~~

- ~~• Goods and services directly and reasonably related to the educational mission;~~
- ~~• Goods and services offered only to students, employees, or guests which cannot be provided by private enterprise as the same or lower cost;~~
- ~~• Use of vehicles for charter trips offered to the public, full- or part-time, or temporary students;~~

- Goods and services which are not otherwise available in the quantity or quality required by the school district;
- Telecommunications other than radio or television stations;
- Sponsoring or providing facilities for fitness and recreation;
- Food service and sales; and
- Sale of books, records, tapes, software, educational equipment, and supplies.

It is the responsibility of the superintendent [or designee] to bring to the board's attention additional sources of revenue for the school district.

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Adopted: 6/70

Reviewed: 12/13; 5/15; 12/18

Revised: 7/10; 10/12

Related Policy (Code#): 801.1; 802.8

Legal Reference (Code of Iowa): §§ 12C; 23A; 24.9; 257.2; 279.8; 41; 282.2, .6, .24; 291.12; 297.9-12, .22; 301.1

IASB Reference: 704.1





## Administrative Regulations Regarding Educational Supply Fee

Code 802.3-R

Students who are enrolled after the beginning of the school year will be charged a fee for consumable materials on the following schedule:

Enrolling In	Amount of Fee
September	100%
October	100%
November	100%
December	85%
January	60%
February	60%
March	45%
April	45%
May	0%

Students who drop from enrollment in the district are entitled to a refund on the following schedule:

Withdrawing Enrollment	Amount of Refund
September	<del>52%</del> 50%
October	<del>52%</del> 50%
November	<del>52%</del> 50%
December	<del>52%</del> 50%
January	<del>32%</del> 25%
February	<del>32%</del> 25%
March	0%
April	0%
May	0%

As granted by *Policy 802.1 Local, State, Federal, and Miscellaneous Revenue*, the district will use a collection agency to collect non-sufficient fund (NSF) checks and unpaid fees. At minimum, two attempts will be made via written correspondence.



**Policy Title: Investments  
Code 802.6**

The Board of Directors hereby directs the board treasurer, in conjunction with the board secretary, to manage the investment of funds for the district. School district funds in excess of current needs are invested in compliance with this policy. The goals of the district's investment portfolio in order of priority are:

1. To provide safety of the principal
2. To maintain the necessary liquidity to match expected liabilities
3. To obtain a reasonable rate of return

In making investments, the school district shall exercise the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use to meet the goals of the investment program.

School district funds are monies of the district, including operating funds. Operating funds of the school district are funds which are reasonably expected to be used during a current budget year or within 15 months of receipt. When investing operating funds, the investments must mature within 397 days or less. If, during the current budget year an amount of public funds will exceed operating funds by at least 33%, the amount of public funds that exceed operating funds by greater than 33% may be invested in certificates of deposit at federally insured depository institutions which mature within 63 months or less, in accordance with state and federal laws. When investing funds other than operating funds, the investments must mature according to the need for the funds.

The board authorizes the board treasurer, in conjunction with the board secretary, to invest funds in excess of current needs in the following investments:

- Interest bearing savings, money market, and checking accounts at the school district's authorized depositories
- Iowa Schools Joint Investment Trust Program (ISJIT)
- Obligations of the US government and its agencies and instrumentalities
- Certificates of deposit and other evidence of deposits at federally insured Iowa depository institutions
- All other investments authorized or hereafter authorized by the Code of Iowa

It is the responsibility of the board treasurer, in conjunction with the board secretary, to oversee the investment portfolio in compliance with this policy and the law and to report portfolio compliance to the superintendent semi-annually.

Where possible, it is the policy of the district to diversify its investment portfolio. Assets are diversified to eliminate the risk of loss resulting from over concentration of assets in a specific maturity, a specific issuer, or a specific class of securities.

It is the responsibility of the board treasurer, in conjunction with the board secretary, to bring a contract with an outside person to invest school district funds, to advise on investments, to direct investments, to act in a fiduciary capacity or to perform other services to the board for review and approval. The board treasurer, in conjunction with the board secretary, will also provide the board and superintendent with information about and verification of the outside person's fiduciary bond. Contracts with outside persons will include a clause requiring the outside person to notify the school district within 30 days of any material weakness in internal structure or regulatory orders or sanctions against the outside person regarding the services being provided to the school district and to provide the documents necessary for the performance of the investment portion of the school district audit. Contracts with outside persons will not be based on the performance of the investment portfolio.

The board treasurer, in conjunction with the board secretary, is responsible for reporting to and reviewing with the superintendent semi-annually, and with the board ~~at its organizational meeting~~, the investment portfolio's performance, transaction activity, and current investments including the percent of the investment portfolio by type of investment and by issuer and maturities. The report will also include trend lines by month over the last year and year-to-year trend lines regarding the performance of the investment portfolio. It is also the responsibility of the board treasurer, in conjunction with the board secretary, to obtain the information necessary to ensure that the investments and the outside persons doing business with the school district meet the requirements outlined in this policy.

It is the responsibility of the board secretary, in conjunction with the board treasurer, to deliver a copy of this policy to the school district's depositories, auditor, and outside persons doing business with the school district.

It is also the responsibility of the board secretary, in conjunction with the board treasurer, to develop a system of investment practices and internal controls over the investment practices. The investment practices are designed to prevent losses, to document the officer's and employee's responsibility for elements of the investment process, and to address the capability of the management. The board secretary, in conjunction with the board treasurer, will review the investment practices and internal controls process with the superintendent annually.

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Adopted: 6/70

Reviewed: 7/10; 10/12; 12/18

Revised: 12/13; 5/15; 11/18

Legal Reference (Code of Iowa): §§ 11.2, .6; 12.62; 12B.10, .10A; 12C; 22.1, .14; 28E.2; 257; 279.29; 283A; 285; 502.701; 633.123

IASB Reference: 704.3 Option III



## **GENERAL**

**Debt Limits:** For general obligation debt, the school district's outstanding debt limit shall be no more than five percent (5%) of the actual value of property within the school district's boundaries as prescribed by the Iowa Constitution and statutory restrictions.

For revenue debt, the school district's goal is to provide adequate debt service coverage of at least 1.20 times the annual debt service costs.

In accordance with Iowa law, the school district may not act as a conduit issuer or issue municipal securities to raise capital for revenue-generating projects where the funds generated are used by a third party (conduit borrower) to make payments to investors.

## **PURPOSES AND USES OF DEBT**

**Capital Planning:** To enhance creditworthiness and prudent financial management, the school district is committed to systematic capital planning, inter-governmental cooperation and coordination, and long-term financial planning. The district maintains, and annually updates, a 10-year facility plan and holds regular meetings of the Facility Advisory Committee to keep the plan updated.

**Capital Financing:** The school district may issue long-term debt for capital projects as authorized by Iowa law which include, but are not limited to, the costs of planning, design, land acquisition, buildings, permanent structures, attached fixtures or equipment, and movable pieces of equipment. Capitalized interest may be included in sizing any capital project debt issue. The types of debt instruments to be used by the school district include:

- General Obligation Bonds
- General Obligation Capital Loan Notes
- Bond Anticipation Notes
- Revenue Anticipation Notes
- School Infrastructure Sales, Services, and Use Tax Revenue Bonds
- Lease Purchase Agreements including Certificates of Participation

**Working Capital Financing:** The school district may issue debt for working capital for operations after cash flow analysis has determined that there is a mismatch between available cash and cash outflows. The school district shall strive to repay working capital debt by the end of the fiscal year in which the debt was incurred. A working capital reserve may be included in sizing any working capital debt issue.

**Refunding:** Periodic reviews of all outstanding debt will be undertaken to determine if refunding opportunities exist. Refunding will be considered (within federal tax law restraints) if and when there is a net economic benefit of the refunding or if the refunding is otherwise in the best interests of the school district, such as to release restrictive bond covenants which affect the operations and management of the school district.

In general, advance refunding for economic savings will be undertaken either: (a) When a net present value savings of at least four percent of the refunded debt can be achieved or (b) if the escrow structure results in a material negative arbitrage (i.e., the cost of the escrow is more expensive than the permitted cost of the escrow using then-current IRS rules), the net present value savings must be at least five percent of the refunded debt. Current refunding which produces a net present value savings of less than three percent (3%) will be considered on a case-by-case basis taking into consideration bond covenants and general conditions. Refunding with negative savings will not be considered unless there is a compelling, public policy objective for doing so.

## **DEBT STANDARDS AND STRUCTURE**

**Length of Debt:** Debt will be structured for the shortest period consistent with a fair allocation of costs to current and future beneficiaries or users. Long-term debt will not be issued for periods exceeding the useful life or average useful lives of the project or projects to be financed. All debt issued will adhere to state and federal laws regarding the length of time the debt may be outstanding.

**Debt Structure:** Debt will be structured to achieve the lowest possible net cost to the school district given market conditions, the urgency of the capital project, the type of debt being issued, and the nature and type of repayment source. To the extent possible, the school district will design the repayment of its overall debt to rapidly recapture its credit capacity for future use.

Generally, the school district will only issue fixed-rate debt. In very limited circumstances, the school district may issue variable rate debt, consistent with the limitations of Iowa law and upon a finding of the board that the use of fixed rate debt is not in the best interest of the school district and a statement of the reasons for the use of variable rate debt.

All debt may be structured using discount, par or premium coupons, and as serial or term bonds or notes or any combination thereof, consistent with Iowa law. The school district should utilize the coupon structure that produces the lowest True Interest Cost (TIC) taking into consideration the call option value of any callable maturities.

The school district will strive to structure their debt in sinking fund installments for each debt issue that achieves, as nearly as practicable, level debt service within an issue or overall debt service within a particular classification of debt.

Derivatives( including but not limited to interest rate swaps, caps, collars, corridors, ceiling and floor agreements, forward agreements, float agreements, or other similar financing arrangements); zero-coupon or capital appreciation bonds are not allowed to be issued consistent with state law.

**Decision Analysis to Issue Debt:** Whenever the school district is contemplating the issuance of debt, information will be developed concerning the following four categories commonly used by rating agencies assessing the school district's credit worthiness:

1. Debt Analysis: Debt capacity analysis, purpose for which debt is proposed to be issued, debt structure, debt burden, debt history and trends, and adequacy of debt and capital planning.
2. Financial Analysis: Stability, diversity, and growth rates of tax or other revenue sources; trend in assessed valuation and collections; current budget trends; appraisal of past

revenue and expenditure trends; history and long-term trends of revenues and expenditures; evidence of financial planning; adherence to GAAP; audit results; fund balance status and trends in operating and debt funds; financial monitoring systems and capabilities; and cash flow projections.

3. Governmental and Administrative Analysis: Government organization structure, location of financial responsibilities and degree of control, adequacy of basic service provision, inter-governmental cooperation/conflict and extent of duplication, and overall planning efforts.
4. Economic Analysis: Geographic and location advantages, population and demographic characteristics, wealth indicators, types of employment, industry and occupation, housing characteristics, new construction, evidences of industrial decline, and trend of the economy.

## **DEBT ISSUANCE**

**Credit Enhancement:** Credit enhancements (i.e., bond insurance, etc.) may be used but only when the net debt service on the debt is reduced by more than the costs of the credit enhancement.

**Costs and Fees:** All costs and fees related to issuing the debt will be paid out of debt proceeds and allocated across all projects receiving proceeds of the debt issue.

**Method of Sale:** Generally, all school district debt will be sold through a competitive bidding process. Bids will be awarded on a TIC basis providing other bidding requirements are satisfied.

The school district may sell debt using a negotiated process in extraordinary circumstances when the complexity of the issue requires specialized expertise, when the negotiated sale would result in substantial savings in time or money, or when market conditions of the school district credit are unusually volatile or uncertain.

**Professional Service Providers:** The school district will retain external bond counsel for all debt issues. All debt issued by the school district will include a written opinion by bond counsel affirming that the school district is authorized to issue the debt and stating that the school district has met all Iowa constitutional and statutory requirements necessary for issuance and determining the debt's federal income tax status. The bond counsel retained must have comprehensive municipal debt experience and a thorough understanding of Iowa law as it relates to the issuance of the particular debt.

The school district will retain an independent financial advisor. The financial advisor will be responsible for structuring and preparing all offering documents for each debt issue. The financial advisor retained will have comprehensive municipal debt experience, experience with diverse financial structuring, and pricing of municipal securities.

The board treasurer [or designee] shall have the authority to periodically select other service providers (e.g., escrow agents, verification agents, trustees, arbitrage consultants, rebate specialist, etc.) as necessary to meet legal requirements and minimize net debt costs. These services can include debt restructuring services and security or escrow purchases.

Compensation for bond counsel, financial advisor, and other service providers will be as economical as possible and consistent with industry standards for the desired qualification levels.

## **DEBT MANAGEMENT**

**Investment of Debt Proceeds:** The school district shall invest all proceeds received from the issuance of debt separate from the school district's consolidated cash pool unless otherwise specified by the authorizing bond resolution or trust indenture. Investments will be consistent with those authorized by Iowa law and the school district's investment policy to maintain safety of principal and liquidity of the funds.

**Arbitrage and Record Keeping Compliance:** The district will maintain a system of record-keeping, reporting, and compliance procedures with respect to all federal tax requirements which are currently or may become applicable through the lifetime of all bonds in accordance with all arbitrage rules and rebate requirements. Such issues of compliance to review should include but are not limited to:

- ~~• Consult with financial advisors and rebate analyst to identify bond proceeds or applicable debt service allocations that must be invested with a yield on such investments does not exceed the yield to which such investments are restricted. These investments shall meet the requirements of the district's investment policy.~~
- ~~• Review with financial advisors that investment of bonds proceeds is performed in compliance with arbitrage rules and rebates.~~
- ~~• Consult with financial advisors to determine whether the district is subject to rebate requirements of Section 148(f) of the code and related treasury regulations with respect to each issue of bonds.~~
- ~~• Consult with rebate analyst to determine rebate liability.~~
- ~~• Consult with financial advisors and rebate analyst to determine whether the district is eligible for any temporary periods for unrestricted investments and is eligible for any of the spending exceptions to the rebate requirements.~~
- ~~• Consult with the rebate analyst and, if appropriate, bond counsel prior to the fifth anniversary date of issuance of each issue of bonds of the district and each fifth anniversary thereafter to arrange for calculations and reports of rebate requirements with respect to such bonds:~~
  - ~~• If a rebate payment is required to be paid by the district the board treasurer, or designee, shall request Form 8038-T be prepared by bond counsel in order to be submitted to the Internal Revenue Service (IRS).~~
  - ~~• If the district is authorized to recover a rebate payment previously paid the board treasurer, or designee, shall consult with the trustee or bond counsel to prepare the appropriate form (Form 8038-R) with the Internal Revenue Service (IRS).~~
- Post-issuance compliance procedures (including proper use of proceeds, timely expenditure of proceeds, proper use of bond finance property, yield restriction and rebate, and timely return filing);
- Proper maintenance of records to support federal tax compliance;
- Investments and arbitrage compliance;
- Expenditures and assets;
- Private business use; and
- Designation of primary responsibilities for federal tax compliance of all bond financings.

**Financial Disclosure:** The school district is committed to full and complete financial disclosure and to cooperating fully with rating agencies, institutional and individual investors, other levels of government, and the general public to share comprehensible and accurate financial information. The school district is dedicated to meeting secondary disclosure requirements on a timely and comprehensive basis as promulgated by the Securities and Exchange Commission.



The official statements accompanying debt issues, certified annual financial reports, annual fiscal audits, and continuing disclosure statements will meet the standards articulated by the appropriate regulatory body including but not limited to the Municipal Securities Rulemaking Board (MSRB), the Government Accounting Standards Board (GASB), and the Internal Revenue Service (IRS). The district may hire a consultant to assist with continuing disclosure statements as required by state and federal regulatory bodies. Any significant financial reports affecting or commenting upon the district will be forwarded to rating agencies and any material events will be reported.

The issuance of securities subjects the district to regulation and risk regarding disclosure provided to investors. The district is committed to providing timely, accurate, and complete disclosure. The district shall assess the risk based on the type of security being issued and the type of offering contemplated and shall hire third-party professional experts in their field to assist the district with the bond sale process and assist with risk mitigation.

In the event that the district is selling securities in a full public offering, the district shall engage legal counsel (whether bond counsel, disclosure counsel, or both) whose engagement shall include an opinion (often called a 10b-5 opinion) regarding the accuracy and completeness of the offering materials (often called the bond official statement). Bond counsel's legal opinion shall cover all material legal and tax-related representations of the district.

The district shall weigh the merits and costs of hiring other third party professionals including financial advisors, underwriters, bank trustees, registrar and paying agent, and continuing disclosure dissemination agents on a case by case basis. The district notes that each potential professional offers specific skill sets not generally available to the district that may be advantageous to the district with respect to the specific offering being contemplated.

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Adopted: 12/13

Reviewed: 5/15; 12/18

Related Policy (Code#): 802.9; 802.9-R2; 804.1

Legal Reference (Code of Iowa): §§ 74-76; 278.1; 298; 298A

IASB Reference: 704.2; 704.2R1



## Business Procedures - Income

### Policy Title: Cash in School Buildings Code 802.10

The amount of cash that may be kept in the school buildings for any one day is sufficient for that day's operations. Funds raised by students are kept in a safe in a secured area **and then deposited in the authorized depository in a timely manner.**

The minimal amount of cash is kept in the central administration office at the close of the day. Excess cash is deposited in the authorized depository of the school district.

It is the responsibility of the superintendent [or designee] to determine the amount of cash necessary for each day's operations and to comply with this policy.

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Adopted: 7/10

Reviewed: 10/12; 12/13; 5/15; 12/18

Related Policy (Code#): 802.8

Legal Reference (Code of Iowa): § 279.8

IASB Reference: 702



### Policy Title: Online Fundraising Campaigns/Crowdfunding Code 802.11

The Linn-Mar Board of Education believes that certain online fundraising campaigns, including crowdfunding campaigns, may further the interests of the district. The district has determined that [donorschoose.org](http://donorschoose.org) is the only approved crowdfunding source. District employees wishing to post a project on [donorschoose.org](http://donorschoose.org) must submit a grant approval request form through the business office. Once the request is approved, the person may post the project on the website. **Any fundraising efforts conducted using the district's name, symbols, or imagery will be conducted in accordance with all policies, regulations, and rules for fundraising within the district.** Items raised by an online fundraising campaign will be the property of the district only upon acceptance by the board and will be used only in accordance with the terms for which they were given, as agreed to by the board.

Approval of requests will depend on factors including, but not limited to:

- Compatibility with the district's educational program, mission, vision, core values, and beliefs
- Congruence with the district and school goals that positively impact student performance
- The district's instructional priorities
- The manner in which donations are collected and distributed by the crowdfunding platform
- Equity in funding
- Other factors deemed relevant or appropriate by the district

If approved, the requestor will be responsible for preparing all materials and information related to the online fundraising campaign and keeping district administration apprised of the status of the campaign.

The requestor is responsible for compliance with all state and federal laws and other relevant district policies and procedures. All items and money generated are subject to the same controls and regulations as other district property and are deposited or inventoried accordingly. No money raised or items purchased will be distributed to individual employees.

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Adopted: 6/16

Reviewed: 12/18

Related Policy (Code#): 508.1; 504.5; 704.4; 904.2

Legal Reference (Code of Iowa); §§ 279.8; 279.42; 565.6

IASB Reference: 704.6



## Business Procedures - Expenditures

### Policy Title: Purchasing/Bidding: Goods and Services Code 803.1

The board supports economic development in Iowa. Purchases should take into account Iowa goods and services from locally-owned businesses located within the Corridor or from an Iowa based company which offers these goods or services if the cost and other considerations meet the required specifications. However, when spending federal Child Nutrition Funds, geographical preference is allowed only for unprocessed agricultural food items as part of response evaluation.

It is the responsibility of the superintendent [or designee] to approve purchases, except those authorized by or requiring direct board action. The superintendent [or designee] may coordinate and combine purchases with other governmental bodies to take advantage of volume price breaks. Joint purchases with other political subdivisions will be considered in the purchase of equipment, accessories, or attachments with an estimated cost of \$50,000 or more.

The superintendent [or designee] will have the authority to authorize purchases without competitive bids for goods and services costing under \$25,000 without prior board approval. For goods and services costing more than \$25,000 and less than \$50,000, the superintendent [or designee] will receive quotes of the goods and services to be purchased prior to board approval. ~~Major item purchases including school buses will require competitive sealed bids. The competitive sealed bid requirement is waived in the case of emergency purchases.~~ Major item purchases costing at least \$50,000, including school buses, will require competitive sealed bids or proposals, except for emergency purchases and those professional services annually appointed/approved by the board for continual and ongoing services (i.e. legal and audit) or board-selected professional services such as those exempted by law from the requirements of competitive bids or quotations (i.e. architect or engineering design services). The purchase will be made from the lowest responsible bidder based upon total cost considerations including but not limited to the cost of the goods and services being purchased, availability of service and/or repair, delivery date, the targeted small business procurement goal, and other factors deemed relevant by the board. In the event that only one quotation or bid is submitted, the board may proceed if the quotation or bid meets the contract award specifications. The board may elect to exempt certain professional service contracts from the thresholds and procedures outlined above. ~~The thresholds and procedures related to purchases of goods and services do not apply to public improvement projects.~~

~~When using federal Child Nutrition Funds to purchase goods and services dollars spent annually must be estimated; it is acceptable to categorize (e.g., groceries, milk, produce, small equipment, large equipment, supplies, and chemicals). A formal sealed bid procurement process is required when annual spending in the category exceeds \$25,000, annually. An informal process is used for all other purchases under the threshold.~~

The board and superintendent [or designee] will have the right to reject any or all bids, or any part thereof and to re-advertise. If it is determined that a targeted small business which bid on the project may be unable to perform the contract, the superintendent [or designee] will notify the Department of Economic Development. The board will enter into such contracts as they deem are in the best interest of the school district.

The district will comply with all federal and state laws and regulations required for procurement, including the selection and evaluation of contractors. The superintendent [or designee] is responsible for developing the administrative process to implement this policy including but not limited to procedures related to suspension and debarment for transactions subject to those requirements.

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Adopted: 6/70

Reviewed: 7/10; 4/16; 12/18

Revised: 10/12; 12/13; 5/15; 11/18

Related Policy (Code#): 803.1-R1; 803.1-R2

Legal Reference (Code of Iowa): §§ 26; 28E; 72.3; 73; 73A; 285; 297; 301; 261 IAC 54; 281 IAC 43.25

IASB Reference: 705.1



## **Purchasing/Bidding: Procedures for Contracts and Purchases Paid with Federal Funds**

**New Policy  
Code 803.1-R2**

All vendors and/or contractors paid with federal funds shall be checked for suspension and debarment on [www.sam.gov](http://www.sam.gov). The district shall not enter into transactions with parties that are debarred, suspended, or otherwise ineligible for participation in federal assistance programs or activities.

The district shall take affirmative steps as required by federal law with respect to small business, minority-owned business, and female-owned businesses, such as: (1) placing such businesses on solicitation lists; (2) soliciting such businesses whenever they are potential sources; (3) when economically feasible, dividing contracts into smaller tasks or quantities to allow participation from such businesses; (4) establishing delivery schedules that encourage participation by such businesses; (5) when appropriate, utilizing the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and (6) requiring the primary contractor, when applicable, to follow these steps with respect to subcontractors.

Procurement for contracts paid with federal funds may be conducted by noncompetitive proposals when one or more of the following circumstances apply: (1) the item is only available from a single source; (2) public exigency or emergency will not permit the delay resulting from competitive bids; (3) the Federal awarding agency expressly authorizes noncompetitive proposals; or (4) competition is inadequate after solicitation of a number of sources.

The district shall ensure that contracts paid with federal funds contain the following provisions when applicable: (1) contracts over \$150,000 shall address remedies, sanctions, and/or penalties for breach of contract terms by contractors; (2) contracts over \$10,000 shall address termination for cause and for convenience; (3) all contracts shall address Equal Employment Opportunity; (4) prime construction contracts in excess of \$2,000 shall include a provision for compliance with the Davis-Bacon Act; (5) contracts over \$100,000 that involve mechanics or laborers shall include a provision for compliance with 40 U.S.C. §§ 3701-3708; (6) if the federal award meets the definition of "funding agreement" under 37 CFR § 401.2, a provision regarding compliance with 37 CFR Part 401; (7) contracts and sub grants over \$150,000 shall include a provision for compliance with the Clean Air Act and the Federal Water Pollution Control Act; (8) all contracts shall include a provision for compliance with federal debarment and suspension requirements; (9) contractors that apply or bid for an award exceeding \$100,000 must file the required certification under the Byrd Anti-Lobbying Amendment.

No district employee, officer, or agent may participate in the selection, award, and administration of contracts supported by a federal award if they have a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of their immediate family, their partner, or an organization which

employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. District officers, employees, and agents may neither solicit for accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. Violation of this requirement may result in disciplinary action for the district employee, officer, or agent.

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Adopted:

Reviewed:

Revised:

Related Policy (Code #): 803.1; 803.1-R1

Legal Reference: Title 2 Code of Federal Regulation (CFR) Grants and Agreements, Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards



## Business Procedures - Expenditures

### Policy Title: Bids and Awards for Construction Contracts Code 803.2

The board supports economic development in Iowa, particularly in The Corridor. Award of construction contracts should take into account the location of the business and should consider Iowa-based companies if the bids submitted are comparable in quality and can be executed without additional cost when compared to those submitted by other bidders.

Public competitive sealed bids are required for construction projects including renovation and repair with a cost exceeding the statutory minimums required by law. The public competitive sealed bid requirement at the statutory minimums required by law is waived in the case of emergency repairs when the repairs are necessary to prevent the closing of a school. The AEA administrator will certify that the emergency repairs are necessary to prevent the closing of a school. The superintendent [or designee] will comply with the competitive quote process for those projects subject to the competitive quote law. The superintendent [or designee] will determine the process for obtaining quotes for projects below the competitive quote limit. The board will approve competitive bids and competitive quotes.

The award of construction contracts will generally be made to the lowest **responsive**, responsible bidder. Criteria for consideration in determining responsible bidders includes but is not limited to:

- History of project completion dates
- Timeliness of work progress on prior projects
- Number, cost, and quality of change orders on previous projects
- Prior experience and qualifications of sub-contractors to do specified work

The board in its discretion after considering factors relating to the construction including but not limited to the cost of the construction, availability of service and/or repair, completion date, and any other factors deemed relevant by the board may choose a bid other than the lowest bid. The board may also offer incentives for meeting project deadlines or penalties for exceeding project deadlines or assign contractors a risk factor based on past performance and experience. The board will have the right to reject any or all bids, or any part thereof, and to enter into the contracts deemed to be in the best interest of the school district.

It is the responsibility of the superintendent [or designee] to make a recommendation and the reason for it to the board for construction contract bids. The board secretary will recommend to the board which bid to accept.

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Adopted: 5/09

Reviewed: 5/15; 4/16

Revised: 10/12; 12/13; 12/18

Related Policy (Code #): 803.2-R

Legal Reference (Code of Iowa): §§ 72; 73; 73A.2, .18; 297.7-8; HF 2713





## Administrative Regulations Regarding Bids and Awards for Construction Contracts

**Code 803.2-R**

Public competitive sealed bids are required for construction projects including renovations and repairs with an estimated cost exceeding the statutory minimums required by law.

The competitive quote process is required for projects that exceed the statutory minimums stated by law but that do not exceed the minimums set for competitive bidding.

The superintendent [or designee] will determine the process for obtaining quotes for projects below ~~\$55,000.00~~ the competitive quote statutory minimums.

The bid and quote process, while herein specified, may be adjusted with notice to accommodate exceptional conditions not limited to budget, time requirements, or construction conditions but shall not exceed statutory limits.

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Adopted: 12/13

Revised: 5/15; 12/18

Related Policy (Code#): 803.2



**Policy Title: District Credit Card Use  
Code 803.3**

The superintendent [or designee] is authorized to enter into an agreement with a financial institution for the use of district credit cards. Use of credit cards will be limited to expenditures necessary to conduct district business. **Actual and necessary expenditures incurred in the performance of work-related duties include, but are not limited to, travel expenses related to professional development or fulfillment of required job duties, payment of claims related to professional development of the board and employees, and other expenses required by employees and the board in the performance of their duties.**

**Employees and officers using a school district credit or procurement card must submit a detailed, itemized receipt to substantiate all expenditures. Failure to provide a proper receipt will make the employee responsible for expenses incurred. Those expenses are reimbursed to the school district no later than 10 working days following use of the school district's credit or procurement card. In exceptional circumstances, the superintendent [or designee] may allow a claim without proper receipt. Written documentation explaining the exceptional circumstances is maintained as part of the school district's record of the claim.**

The superintendent [or designee] designates the employees authorized to use district credit cards for the purchase of appropriate goods and services for district purposes. The superintendent [or designee] will be responsible for establishing administrative procedures that, at a minimum, address the following:

1. Which employees are authorized to use district credit cards.
2. What types of goods and services each employee is authorized to purchase with a district credit card.
3. The maximum amount of any single transaction for each authorized employee.
4. The total maximum dollar amount of purchases for a monthly billing cycle for each authorized employee.

The district will instruct the credit card issuer in writing to block all credit card purchases of unauthorized goods and services, purchases of goods and services from unauthorized merchants, purchases in excess of the single transaction limit, and purchases in excess of the monthly billing cycle limit. District credit card purchases may be made by telephone, facsimile, over the internet, or onsite.

**It is the responsibility of the superintendent [or designee] to determine whether the school district credit or procurement card use is for appropriate school business. It is the responsibility of the board to determine through the audit and approval process of**

the board whether the school district credit or procurement card used by the superintendent and board is for appropriate school business.

District credit card users will be held accountable for appropriate use of district credit cards. Unauthorized use of a district credit card will be grounds for disciplinary action including termination of employment.

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Adopted: 2/05

Reviewed: 10/12; 12/13; 5/15; 12/18

Revised: 7/08

Related Policy (Code#): 803.3-R

IASB Reference: 401.10



## Administrative Regulations Regarding District Credit Card Use

Code: 803.3-R

The Linn-Mar Community School District feels that credit cards can help aid administration take care of school business in an efficient manner. With this in mind, the use of a credit card will only be allowed for certain purchases. These purchases include the following:

1. **Hotel/Motel Expenses:** Employees are expected to use the most cost effective lodging option when traveling. Additional costs incurred above the cost of the room not related to business are the responsibility of the employee.
2. **Travel:**
  - a. Employees are expected to use the most cost effective airfare when traveling to a destination with a distance exceeding 350 miles. Only coach class tickets are allowed.
  - b. Vehicle parking charges.
3. **Meals:**
  - a. Are allowed in an amount not to exceed \$50.00 per person per day. No single meal (e.g. breakfast, lunch, or dinner) should exceed \$30.00. **The total cost of meals will be the actual cost (less tips and any unwaived sales tax) not exceeding \$50.00 for a full day's total.**
  - b. Gratuities are allowed up to 20 percent. Gratuities above 20 percent will require reimbursement from the employee to the district.
  - c. Reimbursement for alcoholic beverages is not permitted.
4. **Registrations:** Conference registrations are allowed to be charged as long as the conference has been approved.
5. **Internet Purchases:** Purchase of materials via the Internet are allowed with prior approval of the district or site administrator.
6. **Other Purchases:** Other purchases will be allowed with prior approval of the site administrator ~~for purchases up to \$1,000.~~ **Credit card purchases in excess of \$1,000 \$5,000 need approval of the ~~chief financial officer and~~ superintendent [or designee].**

All employees who use a district credit card will turn in itemized receipts. Any charges made without verifiable receipts will require the employee to reimburse the district for the charges.

It is also a requirement of the employee to present a copy of the district's tax exempt certificate with all purchases to ensure that sales tax is not charged, failure to do so could require the employee to reimburse the district the sales tax charge.



## Business Procedures - Expenditures

### Policy Title: Public Purpose and Use of Public Funds Code 803.4

The board acknowledges that expenditures and use of district resources may be needed to support the decision-making process in conducting district business, promoting more efficient time frames for conducting business, promulgating a productive working climate, improving personnel well-being and morale, and nurturing a positive learning environment. To serve these purposes, the board supports appropriate expenditures and use of district resources for attainment of the district mission and strategic goals for official district activities and business.

The district is committed to managing and spending public funds in a transparent and responsible manner. Prior to making a purchase with public funds, an individual should be comfortable defending the purchase/reimbursement to the taxpayers in the district. If the individual is uncomfortable doing so, the purchase may not fulfill a public purpose and additional guidance should be sought before the purchase is made.

Individuals who have concerns about the public purpose of a purchase or reimbursement should utilize the districts internal controls policy and regulations (Refer to policies 801.7 and 801.7-R) as resources for questioning a purchase. Concerns should be reported to the superintendent and/or the board president.

The superintendent shall develop a process for approving expenditures of public funds. The board will review expenditures and applicable reports, as necessary, to ensure proper oversight of the use of public funds. To the extent possible, expenditures shall be pre-approved by the district prior to expending the funds. Purchases of food and refreshments for district staff, even within district, should comply with the district's employee travel allowance policy (Refer to policies 803.10 and 803.10-R), and all other applicable policies. All purchases/reimbursements shall comply with applicable laws, board policies, and district accounting requirements.

~~The superintendent [or designee] may approve payment from the general fund in a reasonable amount for the following expenditures:~~

- ~~1. Expenditures for food items and refreshments for district staff for meetings held before normal start times, during the lunch hour, after normal work times, and anytime during the day when food and refreshments are served.~~
- ~~2. Expenditures for food items and refreshments for district staff meetings with outside organizations and associations.~~
- ~~3. Expenditures for food items and refreshments for board members and staff during board meetings.~~
- ~~4. Expenditures for food items and refreshments for board committees or superintendent committees during meetings.~~

- ~~5. Expenditures for food items, refreshments, and recognition items for recognizing the services of employees, retirees, or volunteers.~~
- ~~6. Expenditures for food items, refreshments, and recognition/retention items given to staff for recognizing and promoting wellness program participation and initiatives.~~
- ~~7. Expenditures for food items, refreshments, and/or tokens supplied for service-related or recognition activities.~~

~~The superintendent [or designee] is responsible for administrative regulations that define implementation of this policy.~~

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Adopted: 2/00

Reviewed: 7/10; 5/15; 12/18

Revised: 10/12; 12/13

Related Policy (Code#): 801.7; 801.7-R; 803.10; 803.10-R; 803.4-R

IASB Reference: 705.4; 705.4R1



## Administrative Regulations Regarding Public Purpose and Use of Public Funds

Code: 803.4-R

~~In supporting the essence of board policy, these regulations have been developed to help identify the types and reasonable amounts of expenditures. This is not an all-inclusive list.~~

The following is a list of examples organized by activity for what is allowable, or not allowable, as a purchase/reimbursement using public funds. This regulation is intended as guidance and there may be situations that are not listed here. Any questions regarding the appropriateness of an expenditure should be submitted **prior to** expending funds.

- Use of Credit/Procurement Card: All purchases through a district-owned credit or procurement card shall be pre-approved and comply with district policies 803.3 and 803.3-R.
- Mileage: Individuals who are required to travel (other than to and from work) as part of fulfilling their job duties to the district shall be reimbursed for mileage costs in accordance with the requirements stated in policies 803.10 and 803.10-R regarding travel allowances.
- Travel Accommodations: Employees who are required to travel and stay overnight as part of fulfilling their job duties to the district shall be reimbursed for costs in accordance with the requirements stated in policies 803.10 and 803.10-R regarding travel allowances.
- Alcohol: Alcohol is a personal expense and is never allowable for purchase or reimbursement using public funds.
- Retirement and Recognition Gifts: Recognizing an employee or volunteer's years of dedication to educating the community and commitment to the district serves a public purpose by honoring individuals with a token gift or honorarium in recognition of their service. The same is true for individual awards, mementos, or items purchased in recognition of employee service to the district. These purchases may use public funds provided the expenditures are modest and approved by the superintendent.
- Honoraria: District employees may, at times, receive an honorarium from an outside source as compensation for the employee's time devoted to preparing and delivering a presentation within the scope of their professional field. Honorariums may only be accepted by employees when they have used their personal time outside of their work for the district to prepare and deliver the presentation. If the employee uses district time or resources to prepare or deliver a presentation, any honorarium shall be given to the district.
- Memorial Gifts: Memorial flowers to convey sympathy or congratulations are allowable as a public expense if they have been approved by the superintendent. Memorial cards are always appropriate. Memorial gifts of any sort other than flowers and/or a card are a personal expense.
- Breakroom Supplies: The purchase of perishable or disposable supplies for employee breakrooms is primarily designed for individual consumption and is a

personal expense. This includes items such as coffee, coffee filters, plates, cups, spoons, napkins, etc.

- Supplies for Public Areas: Limited refreshments, such as water and coffee, may be available in public reception areas of the district including, but not limited to, the central office, the building administrator's office, etc. These refreshments may be purchased with the use of public funds as they provide light refreshment to members of the community.
- Food/Refreshments: Food and refreshments are typically a personal expense. Meetings spanning mealtimes should be avoided when possible. When a district meeting is required to take place spanning a customary mealtime, the superintendent [or designee] shall determine whether food and/or refreshments will be provided to employees whose presence is required during the meeting. The cost of food and refreshments for employees shall be reasonable and, when possible, a separate itemized receipt for each employee is required. If an itemized receipt is not available, approval is required by the school business official prior to reimbursement

The superintendent [or designee] may approve payment from the general fund in a reasonable amount for the following expenditures:

1. Expenditures for food items and refreshments for district staff for meetings held before normal start times, during the lunch hour, after normal work times, and anytime during the day when food and refreshments are served.
2. Expenditures for food items and refreshments for district staff meetings with outside organizations and associations.
3. Expenditures for food items and refreshments for board members and staff during board meetings or work sessions.
4. Expenditures for food items and refreshments for board committees or superintendent committees during meetings.
5. Expenditures for food items, refreshments, and recognition items for recognizing the services of employees, retirees, or volunteers.
6. Expenditures for food items, refreshments, and recognition/retention items given to staff for recognizing and promoting wellness program participation and initiatives.
7. Expenditures for food items, refreshments, and/or tokens supplied for service-related or recognition activities.

### ~~Public money may be used for:~~

The superintendent [or designee] may also approve public money to be used for:

1. Volunteer service recognition items, not to exceed \$25 per volunteer.
2. Meals (food and drink) for student participants, coaches, and staff including end of season banquets. This pertains to meals at a Linn-Mar facility or offsite.
3. Recognition items paid for from student activity funds, not to exceed \$50 per student participant for trophies, plaques, awards, and other non-cash items.
4. Token items supplied to students for service-related or recognition activities paid for from the general fund not to exceed \$10 per student for similar items such as t-shirts, water bottles, awards, and other non-cash items. **Items purchased for student Positive Behavioral Interventions and Supports (PBIS) incentives are allowable if the cost does not exceed \$10 per student.**



5. Purposes clearly specified in approved fundraising activities and shared with patrons in fundraising materials.
6. **One apparel item** for coaches and sponsors to be worn for team competitions and/or performances not to exceed \$50 per season per coach. Such apparel must be clearly specified on fundraising forms and shared with patrons in fundraising materials. Apparel must adhere to district licensing agreements for registered marks and logos. ~~Major performance event themes are permitted but only one apparel item is permitted per season.~~

**Public money may not be used for:**

- a. All other apparel for coaches, ~~and~~ sponsors, **employees, and other individuals** not listed above
- ~~b. Apparel for family members of coaches~~
- ~~c. Apparel for coaches in lieu of wages~~
- d. Personalized apparel
- e. Personal apparel: underwear, bras, socks, shoes, etc.
- f. Gifts for coaches, **sponsors**, or their family members
- g. Meals (food or drink) for ~~parents, wives, or other~~ family members of the coaches, **sponsors**, and/or the student participants ~~or coaches unless reimbursed by the guest to the district~~
- ~~h. Apparel for student participants that is not part of the uniform~~
- i. Individual camp or clinic fees for students
- j. Gift cards/cash incentives **given to students, employees, or other individuals**
- k. **Gifts, decorations, meals, or other costs for staff birthdays, holiday parties, or other occasions that are personal in nature**

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Adopted: 1/13

Reviewed: 5/15; 12/18

Revised: 12/13

Related Policy (Code#): 803.4

IASB Reference: 705.4; 705.4R1



## Business Procedures - Expenditures

### Policy Title: Approval and Payment for Goods and Services Code 803.6

The Board of Directors authorizes the issue of warrants and ACH transfer of funds for payment of claims against the district for goods and services. The board will allow the warrants after the goods and services have been received and accepted in compliance with board policy.

Each payment must be made payable to the person entitled to receive the money. The board ~~may by resolution authorize~~ **authorizes** the board secretary, upon approval of the superintendent, to issue payments when the board is not in session for payment of reasonable and necessary expenses but only upon verified bills filed with the board secretary or treasurer and for the payment of salaries pursuant to the terms of a written contract. Each payment must be made payable only to the person (business, corporation, or other qualified entity) performing the service or presenting the verified bill and must state the purpose for which the payment is issued.

All bills and salaries for which payments are issued prior to audit and allowance by the board must be approved by the board at the next board meeting and be entered in the regular minutes by the board secretary.

The board president and board secretary may sign warrants by use of a signature plate.

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Adopted: 6/70

Reviewed: 10/12; 5/15; 12/18

Revised: 12/13

Related Policy (Code #): 803.1; 803.2; 803.4; 803.7

Legal Reference (Code of Iowa): §§ 279.8, .29, .30, .36; 291.12; 721.2(5)

IASB Reference: 705.3



## Business Procedures - Expenditures

### Policy Title: Travel Allowances Code 803.10

Employees traveling on behalf of the school district and performing approved school district business may be reimbursed for their actual and necessary expenses. Actual and necessary travel expenses will include, but not be limited to, transportation and/or mileage costs, lodging expenses, meal expenses, and registration costs. Travel within the school district and outside of the school district must be pre-approved by the superintendent [or designee]. Pre-approval will include an evaluation of the necessity of the travel, the reason for the travel, and an estimate of the cost of the travel to qualify as approved school district business.

All personnel of the school district are encouraged to use the district credit card for travel expenses authorized by the superintendent [or designee] and described in policies 803.1, 803.1-R1, 803.1-R2, 803.3, 803.3-R, and 803.10-R for travel incurred under the policies of the Board of Directors. Travel expenses incurred without the use of a district credit card ~~will~~ may be reimbursed according to administrative regulations.

All personnel will be reimbursed for any travel from their offices while in the performance of their assigned duties at the mileage rate per mile as set by the State of Iowa. This does not include travel to and from work and home, but it does include any required travel expenses between district facilities.

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Adopted: 6/70

Reviewed: 12/13; 5/15; 12/18

Revised: 10/12

Related Policy (Code#): 205.1; 803.1; 803.1-R1-R2; 803.3; 803.3-R; 803.10-R

Legal Reference (Iowa Code): 279.8, .29, .30

IASB Reference: 401.7; 401.10



## Administrative Regulations Regarding Travel Allowances

**Code 803.10-R**

Reimbursement for actual and necessary expenses may be allowed for travel within the school district and outside the school district if the employee received pre-approval for the travel. Personal reimbursements of travel expenses will be limited as all personnel of the school district are encouraged to use a district credit card for travel expenses. Prior to reimbursement of actual and necessary expenses, the employee must provide the school district with a detailed, itemized receipt indicating the date, purpose, and nature of the expense for each claim item. Employees may also be required to provide an explanation as to why a district credit card was not used for travel purposes. In exceptional circumstances, the superintendent [or designee] may allow a claim without proper receipt. Written documentation explaining the exceptional circumstances is maintained as part of the school district's record of the claim. Detailed expense reports must be submitted to the appropriate administrator's office upon return from travel within 30 calendar days of the last day of travel. These reports will be filed on forms provided by the district or by using the online district mileage reimbursement program. Claims presented for reimbursement beyond the 30 calendar days will not be approved unless an exception is made by the superintendent [or designee].

~~Reimbursement claims must be submitted within 30 calendar days of the last day of travel. Any prior year claims presented for reimbursement beyond the 30 calendar days will not be approved.~~

### Reimbursement Regulations

Out of Town Meals and Lodging:

1. The cost of each meal will be itemized separately by date. No single meal (e.g. breakfast, lunch, or dinner) will exceed \$30.00. The total cost of meals will be the actual cost (less tips and any unwaived sales tax) not exceeding \$50.00 for a full day's total, except for meals which may be paid for through convention registration or as verified by a receipt.
2. Tips for any one meal should not exceed 20%.
3. Meals in the metro immediate Cedar Rapids/Marion corridor area are not reimbursable unless an exception is made by the superintendent [or designee].
4. State sales tax for meals is allowed if the vendor cannot waive it for public schools that are tax exempt.
5. No reimbursement will be paid for alcoholic beverages.
6. Hotel/motel bills should be filed with the expense report. The amount claimed for reimbursement should be include the actual cost or single rate, as appropriate of the room charges and any applicable hotel taxes and fees only [if they are unable to waive them for public schools that are tax exempt] and must be reflected on an itemized hotel receipt.
7. Travel costs for a spouse or anyone other than the district employee shall be a personal expense and not allowed by the district.

8. Charges for phone calls will not be reimbursed unless specifically noted as related to business.

#### Transportation:

1. Whenever possible, travel should be by school vehicle rather than by a private vehicle.
2. When a school-owned vehicle is not available, a private vehicle may be used and the mileage rate per mile set by the State of Iowa will be allowed. The cost of the use of a private vehicle should not exceed the cost of coach rate by commercial airfare.
3. Fees for parking will be reimbursed when verified by a receipt **and reasonable in nature (i.e. valet parking is not considered reasonable)**. Fees for tollways will also be reimbursed.

#### Transportation by Public Carrier, Taxi, or other Rideshare Services:

1. **Employees are expected to use the most cost-effective airfare when traveling to a destination with a distance exceeding 350 miles.** Reimbursement is provided for coach rate on commercial airlines or other public carriers when appropriate. A claim for reimbursement must be accompanied by a receipt from the public carrier.
2. When approved, public carrier tickets may be purchased through a designated local travel agency which will bill the proper account directly.
3. **Reimbursement is provided for taxi or other rideshare services if related to business and reasonable in nature. Receipts are required in order to receive reimbursement.**
4. **Tips for taxis and/or rideshare services should not exceed 20% per transaction.**

#### Use of District-Owned Vehicles:

Certain district employment positions may require regular and extensive in-district travel. Due to the required duties of these positions, the district may provide certain positions with use of district-owned vehicles. Employees who utilize district-owned vehicles during the course of their job duties are fulfilling the public purpose of meeting the needs of the educational community in an efficient and time-sensitive manner. District-owned vehicles are purchased and maintained with public money and must be used strictly in accordance with fulfilling a public purpose. These vehicles represent the district in carrying out its educational mission. Therefore, district-owned vehicles will be clearly marked at all times to identify the district.

The superintendent [or designee] is responsible for developing administrative regulations regarding actual and necessary expenses, in-school district travel allowances, and assignment and proper use of school district vehicles. The administrative regulations will include the appropriate forms to be filed for reimbursement to the employee from the school district and the procedures for obtaining approval for travel outside of and within the school district.

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Adopted: 2/77

Reviewed: 10/12; 5/15

Revised: 12/13; 12/18

Related Policy (Code#): 205.1; 803.1; 803.1-R1-R2; 803.3; 803.3-R; 803.10

IASB Reference: 401.7; 401.10



## Business Procedures - Reports

### Policy Title: Treasurer's Annual Report Code 804.2

At the board's annual meeting, the board treasurer will give the annual report stating the amounts held over; received; paid out; and on hand in the following funds: general, management, physical plant and equipment levy (PPEL), playground equipment and recreation levy (PERL), debt service, student activities, capital projects, and school nutrition, and other enterprise funds. This report will be in written form and sent to the board with the agenda for the annual meeting.

The board treasurer will also furnish the board with a sworn statement from each depository showing the balance on deposit.

It is the responsibility of the board treasurer to submit this report to the board on an annual basis.

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Adopted: 6/70

Reviewed: 10/12; 12/13; 5/15; 12/18

Revised: 4/09

Related Policy (Code#): 204.4

Legal Reference (Code of Iowa): §§ 279.31, .33

IASB Reference: 707.2



## Business Procedures - Records

### Policy Title: Bonds for Officers and Employees Code 805.1

The secretary and treasurer of the Board of Directors will each give bond to the school district in such amount as the board may require but in no case less than \$10,000, and with sureties to be approved by the board. Bonds will be filed with the district's business office.

All other employees will be covered by a blanket bond in the amount of \$150,000.

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Adopted: 6/70

Reviewed: 10/12; 12/13; 5/15; 12/18

Revised: 7/10

Legal Reference (Code of Iowa): §291.2

Delete - Covered in policies 202.5 and 202.6





**Policy Title: Insurance Program and Review  
Code 806.1**

The board will maintain a comprehensive property and casualty insurance program to provide adequate coverage against major types of risk, loss, or damage as well as legal liability. The board will purchase insurance for the replacement values, when possible, after reviewing the costs and availability of such insurance. The comprehensive insurance program will be reviewed once every three years. **Insurance will only be purchased through legally licensed Iowa insurance agents.**

The school district will assume the risk of property damage, legal liability, and dishonesty in cases in which the exposure is so small or dispersed that a loss would not significantly affect the operation of the education program or financial condition of the school district.

The board may retain a private appraisal agency for inventory and appraisal value services. An itemized statement of the appraised value of school district facilities will be kept. The appraisal will be updated at least once every five years. Insurance will only be purchased through legally licensed Iowa insurance agents.

Administration of the insurance program placing the insurance coverage and loss prevention activities is the responsibility of the superintendent [or designee]. The board secretary [or designee] is responsible for maintaining property appraisals and inventories, processing claims, and maintaining loss records.

It is the responsibility of the superintendent [or designee] to recommend, when necessary, the use of a private appraisal agency and make recommendations to the board for the purchase of additional insurance coverage.

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Adopted: 6/70

Reviewed: 10/12; 5/15; 12/18

Revised: 12/13

Legal Reference (Code of Iowa): §§ 20.9; 85.2; 279.12, .28; 285.5(6), .10(6); 296.7; 298A; 517A.1; 670.7

IASB Reference: 709



## Business Procedures – Emergency Plans

### Policy Title: Response Plan-Radiological Emergency Code 807.1

The Board of Directors will maintain a districtwide plan for response to any radiological emergency at NextEra Energy Duane Arnold, LLC.

The plan will be a coordinated effort between the Linn-Mar Community School District and the company that operates the reactor at NextEra Energy Duane Arnold, LLC.

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Adopted: 4/89

Reviewed: 10/12; 12/13; 5/15; 12/18

Revised: 9/09; 11/18

Related Policy (Code#): 504.10; 807.2; 902.12

Delete - Covered in policy 807.2



## Board of Directors – General Organization

### Policy Title: Organization of the School Board Code 201.6

The Linn-Mar Community School District Board of Education is authorized by and derives its organization from Iowa law. The board will consist of seven board members.

The board is organized for the purpose of setting policy and providing general direction for the school district. The board will hold its organizational meeting at **or before** the first regular meeting following the canvass of votes. Notice of the meeting place and time will be given by the board secretary to each member, member-elect, and the public. The purpose of the organizational meeting is to transfer materials and responsibility from the outgoing board to the new board.

At the organizational meeting, the board will elect a president and a vice president who will hold office for one year. In even numbered years, the president and vice president are elected at the annual meeting. Once elected, the president and vice president will be entitled to vote on all matters before the board.

**Vacancies in Officer Positions:** If any office of the board should become vacant between organizational meetings such office will be filled as follows:

- President: Filled by the vice president (Policy 202.4)
- Vice President: Filled by election from members of board (Policy 202.4)
- Secretary: Filled temporarily by the superintendent (Policy 202.5)
- Treasurer: Filled temporarily by the business manager until a replacement is appointed by the board (Policy 202.6)

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Adopted: 6/70

Reviewed: 10/11; 9/16; 10/19

Revised: 4/13; 9/13; 8/14

Related Policy (Code#): 202.4-6

Legal Reference (Code of Iowa): §§ 274.2; 275.23A; 277.23, .28, .31; 279.1, .5, .7-8, .33; 281 IAC 12.3(2)

IASB Reference: 200.1; 200.1R1; 202; 206.1-2; 210



**BOARD OF DIRECTORS**  
**CONFLICT OF INTEREST DISCLOSURE FORM – FY2022**

I hereby certify that I have, or may have, a financial interest or conflicting interest as noted below. The potential conflict is with the following individual and/or organization with which the Linn-Mar CSD has, or might reasonably have in the future, a relationship with; or which Linn-Mar CSD may enter into a transaction with or compete with.

**Name of conflicting or financial interest (individual or company, etc.): Please print**

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**Reason for potential conflict (e.g. family relationship, financial relationship, etc.): Please print**

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**All facts pertinent to the conflicting or financial interest: Please print**

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I have no conflicts of interest to disclose.

I hereby certify that I have read and understand Policy 202.7-School Board Conflict of Interest, which I received a copy of, and that the above information is true, correct, and complete to the best of my knowledge, information, and belief. I further certify that I will comply with the requirements of the School Board Conflict of Interest policy.

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Board Member’s Signature

Date

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Printed Name

Please return this form to JT Anderson, Board Secretary/Treasurer  
2999 N 10<sup>th</sup> Street, Marion IA 52302 or via email to: [jtanderson@Linnmar.k12.ia.us](mailto:jtanderson@Linnmar.k12.ia.us)

**Complete additional forms for multiple conflicts/financial interests, as needed.**



## Board of Directors – Meetings of the Board

### Policy Title: Closed Sessions of the School Board Code 204.3

Generally, board meetings will be open meetings unless a closed session ~~or exempt meeting~~ is provided for by law. ~~The board will hold a closed session or exempt meeting in the situations stated below.~~ **The board may enter into a closed session for any reason permitted by law.**

~~Exceptions to the Open Meetings Law:~~ Closed sessions take place as part of an open meeting. The item for discussion in the closed session will be listed as part of the tentative agenda on the public notice **with the full text of the Iowa Code citation reference stated on the agenda.** The motion for a closed session, stating the purpose for the closed session, will be made and seconded during the open meeting. A minimum of two-thirds of the board, or all of the board members present **if any are absent,** must vote in favor of the motion on a roll call vote. Closed sessions will be ~~electronically~~ recorded and have detailed minutes kept by the board secretary ~~or court reporter.~~ **No voting will take place in the closed session.** Final action on matters discussed in the closed session will be taken in an open meeting.

The minutes and the ~~electronic~~ recording will restate the motion made in the open meeting, the roll call vote, the members present, and the time the closed session began and ended. The ~~electronic~~ recording and written minutes will be kept for one year from the date of the meeting. Real estate related minutes and recordings will be made public after the real estate transaction is completed.

The detailed minutes and ~~electronic~~ recording will be sealed and will not be public record open to public inspection. The minutes and ~~electronic~~ recording will only be **available to board members or** opened upon court **or administrative** order in an action to enforce the requirements of the open meetings law. The board has complete discretion as to who may be present at a closed session, **but generally closed sessions will be limited to the board, a recording secretary, and the superintendent if indicated.** The board has discretion to nominate the board secretary or any board member to serve as the recording secretary for the closed session.

~~Reasons for the board entering into a closed session from an open meeting include, but are not limited to, the following:~~

- ~~1. To review or discuss records which are required or authorized by state or federal law to be kept confidential or to be kept confidential as a condition for the board's possession or receipt of federal funds. (Section 21.5(1)(a))~~
- ~~2. To discuss strategy with legal counsel in matters presently in litigation, or where litigation is imminent, if disclosure would be likely to prejudice or disadvantage the board. (Section 21.5(1)(c))~~

- ~~3. To discuss whether to conduct a hearing or conduct a hearing for suspension or expulsion of a student, unless an open meeting is requested by the student or the parent of the student. (Section 21.5(1)(e))~~
- ~~4. To evaluate the professional competency of an individual whose appointment, hiring, performance, or discharge is being considered when a closed session is necessary to prevent needless and irreparable injury to that individual's reputation and that individual requests a closed session. (Section 21.5(1)(i))~~
- ~~5. To discuss the purchase of particular real estate, but only when premature disclosure could be reasonably expected to increase the price the board would have to pay for the property, or in case of a sale reduce the price the board could receive for the property. (Section 21.5(1)(j))~~

~~**Exemptions to the Open Meetings Law:** Board meetings at which a quorum is not present, or gatherings of the board for purely ministerial or social purposes when there is no discussion of policy or no intent to avoid the purposes of the open meetings law, are exempt from the open meetings law requirements. Since gatherings of this type are exempt from the open meetings requirements, they can be held without public notice, be separate from an open meeting, be held without electronic recording of the gathering or taking minutes and be held without a vote or motion. The board may also hold an exempt session for the following:~~

- ~~1. Negotiating sessions, strategy meetings of public employers or employee organizations, mediation, and the deliberative process of arbitration; (Section 20.17(3))~~
- ~~2. To discuss strategy in matters relating to employment conditions of employees not covered by the collective bargaining law; (Section 20.9)~~
- ~~3. To conduct a private hearing related to the recommended termination of a teacher's contract. However, the private hearing in the teacher's contract termination will be recorded verbatim by a court reporter; and (Section 21.9)~~
- ~~4. To conduct a private hearing relating to the termination of a probationary administrator's contract or to review the proposed decision of the administrative law judge regarding the termination of an administrator's contract. (Section 279.24)~~

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Adopted: 6/70  
Reviewed: 4/13; 10/19  
Revised: 10/11; 8/14; 9/16  
Legal Reference (Code of Iowa): §§ 21; 22.7; 279.24  
IASB Reference: 212



## Board of Directors – Meetings of the Board

**New Policy**

### **Policy Title: Exempt Meetings of the School Board Code 204.5**

Board meetings at which a quorum is not present, or gatherings of the board for purely ministerial or social purposes when there is no discussion of policy or no intent to avoid the purposes of the open meetings law, are exempt from the open meetings law requirements. Since gatherings of this type are exempt from the open meetings requirements, they can be held without public notice, be separate from an open meeting, be held without electronic recording of the gathering or taking minutes and be held without a vote or motion. The board may also hold an exempt session for the following reasons or as may be otherwise authorized by law:

1. Negotiating sessions, strategy meetings of public employers or employee organizations, mediation, and the deliberative process of arbitration;
2. To discuss strategy in matters relating to employment conditions of employees not covered by the collective bargaining law;
3. To conduct a private hearing related to the recommended termination of a teacher's contract. However, the private hearing in the teacher's contract termination will be recorded verbatim by a court reporter; and
4. To conduct a private hearing relating to the termination of a probationary administrator's contract or to review the proposed decision of the administrative law judge regarding the termination of an administrator's contract.

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Adopted: 6/70

Reviewed: 4/13; 10/19

Revised: 10/11; 8/14; 9/16

Related Policy (Code#): 204.1-4; 204.7-16

Legal Reference (Code of Iowa): §§ 20.17; 21; 22.7; 279.15-16

IASB Reference: 208; 211; 212; 212.1



## Board of Directors – Meetings of the Board

### Policy Title: Board Meeting Agenda Code 204.7

The tentative agenda for each board meeting will state the topics for discussion and action at the board meeting. The agenda is part of the public notice of the board meeting and will be posted and distributed.

It is the responsibility of the superintendent and board president to develop the agenda for each board meeting. **Any board member may place an item on the next regular agenda with the consent of a majority of the board. Board members wishing to do so should provide notice to the superintendent and board president at least 10 days prior to the scheduled meeting.**

Individuals wishing to place an item on the agenda can make a request to the superintendent or board president **prior to the drafting of the tentative agenda** who will decide whether to place the item on the agenda and, if so, the appropriate meeting date. The person making the request must state their name, address, purpose of the presentation, action desired, and pertinent background information. **Requests from the public may be added to the tentative agenda at the discretion of the superintendent after consultation with the board president.** Requests received after the deadline for processing the agenda may only be added to the agenda for good cause.

Individuals may also submit a valid petition to the board secretary **to request a public hearing on a specific topic.** Refer to *Policy 204.9 Public Participation in Board Meetings* for additional information on petitions to place a topic on the board agenda **via a public hearing.**

The tentative agenda and supporting documents will be sent to board members at least two days prior to the scheduled board meeting. These documents are the private property of the board member.

The board will take action only on items listed on the tentative agenda posted with the public notice. Items added to the agenda after the statutorily required 24-hour notice may be discussed or taken under advisement by the board. If an added item is acted upon, the minutes of the board meeting will state the reason justifying immediate action. The board will exercise this discretionary authority with great care.

Board action voted on from a previous agenda item cannot be brought forward for a second vote unless the following parameters are met:

1. There is proof of a significant change of facts or addition of vital information not included in the discussion or motion of the first vote.
2. The proposed change must meet a clearly demonstrated, mission-related need.



3. The proposed change must address the impact on students, other programs, courses, services, staffing, and/or projects.
4. The proposed change survives a cost-benefit analysis as per the timeline of execution and any changes to the motion of the initial vote.

Any additional information related to the addition of the second vote on a subsequent board agenda must be distributed in a timely manner by the superintendent through the board secretary with the agenda for the meeting, at which consideration of a second vote will be reviewed.

In order for a more efficient administration of board meetings, the board may elect to use a consent agenda for the passage of items under the management of the superintendent, board president, and board secretary. By using a consent agenda, the board has consented to the consideration of certain items as a group under one resolution. Items may be removed from the consent agenda at the request of a board member.

Public hearings may be held on school district matters at the discretion of the board. Public notice of a public hearing will be in the same manner as for a board meeting except that notice will be given at least 10 days before the hearing is to be held; unless it is impossible or impractical to do so or the law requires otherwise.

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Adopted: 6/70

Reviewed: 10/11; 4/13; 9/16; 10/19

Revised: 1/12; 8/14; 9/21

Related Policy (Code#): 204.1; 204.4; 204.9

Legal Reference (Code of Iowa): §§ 21; 279.8, 1980 Op Atty Gen 269

IASB Reference: 210.8; 210.9; 214



## Board of Directors – Meetings of the Board

### Policy Title: Public Participation in Board Meetings Code 204.9

The board encourages public attendance and participation in its public meetings. The board has a significant interest in maintaining the decorum of its meetings and it is expected that members of the public and the board will address each other with civility

In assuring the public is heard and board meetings are conducted efficiently and in an organized manner, the board has established a specific agenda item, *Audience Communications*, for the purpose of providing the public an opportunity to express their points of view on items related to school business. Audience communications will be taken under consideration and a response, if appropriate, may be issued at another time. Board members will not respond to or act on audience communications during the public meeting. Audience communications are limited to regular board meetings and will not be routinely offered during special meetings.

#### **Audience Communications**

Audience communications are subject to the following regulations:

1. Time Limit: Speakers will limit their comments to three minutes, unless the time limit is waived by the board president, or a majority of board members present. When there are a large number of speakers to be heard, the board may shorten the allotted time.
2. Addressing the Board: The speaker is asked to stand at the podium, be recognized by the presiding officer, sign in, state their name, and identify whom they represent. Only individuals recognized by the presiding officer will be allowed to speak and any comments by others are deemed out of order. All comments should be shared in a respectful manner and should not contain names or other identifying information about students, teachers, administrators, or other personnel because of the confidential nature of certain situations. Individuals who have a complaint about employees may bring their complaint to the board only after they have followed *Policy 1003.3 Complaints about School Personnel*.
3. Receipt of Speaker Comments: Comments will be received by the board and, if appropriate or for clarification purposes, the board president or superintendent may seek additional information from the speaker. The board, at its discretion, may choose to place the speaker's topic on a future agenda or delegate any action to the appropriate administrator.
4. Conduct and Remarks Deemed Out of Order: Undue interruption or other interference with the orderly conduct of board business will not be allowed. Defamatory or abusive remarks are always deemed out of order. The board president or presiding officer may terminate the speaker's comments if, after being called to order, they persist with improper conduct or remarks. If deemed disruptive, the individual(s) causing the disruption will be asked to leave the meeting.

5. Special Procedures: The board reserves the right to establish special procedures to deal with extraordinary issues or circumstances. If the decision is made not to include audience communications during a particular meeting, it will be noted on the board agenda which is posted at least 24 hours before the scheduled board meeting.

### **Petitions to Place a Topic on the Agenda**

~~Individuals who wish for an item to be placed on a board agenda must submit a valid petition to the board secretary. For a petition to be valid, it must be signed by at least 500 eligible electors of the district or 10% of the individuals who voted in the last school election, whichever number is lower.~~

~~Upon receipt of a valid petition to place a proposal on the next board agenda for public hearing, the proposal identified in the petition will be placed on the agenda of the next regular meeting, or a special meeting will be held within 30 days of receipt of the valid petition.~~

*Per Iowa House File 868, Section 31, 279.8B entitled, Petition-School Board Meeting Agenda: Upon receipt of a petition by eligible electors of a school district equal in number to at least 10 percent or the persons who voted in the last preceding election of school officials [per section 277.1] or 500 eligible electors, whichever is less, the board of directors of the school district shall place the proposal specified in the petition on the agenda of the next regular meeting of the school board or on the agenda of a school board meeting held within 30 days of receipt of the valid petition filed in accordance with this subsection.*

During the public hearing, the board will provide a sign-up sheet for all individuals who wish to speak. The sign-up sheet will require each individual to list their legal name and mailing address. Each speaker will be limited to an amount of time established by the board that is reasonable and necessary based on the number of speakers who have signed up. The same time limit will apply to all speakers on the proposal and each individual will be limited to one opportunity to speak. The board maintains absolute discretion on whether or not to discuss or act on the public comments made on the proposal. If a petition is related to curriculum, the district maintains discretion to determine whether to stop teaching the curriculum until the board holds the public hearing to discuss the petition.

**For additional information on the development of school board agendas, refer to LMCS D Policy 204.7 - Board Meeting Agenda.**

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Adopted: 3/72

Reviewed: 10/11; 9/16; 10/19

Revised: 4/13; 8/14; 10/14; 9/21

Related Policy (Code#): 204.1; 204.4; 204.7; 1003.3

Legal Reference (Code of Iowa): §§ 21; 22; 279.8

IASB Reference: 213



**LINN-MAR CSD EMPLOYEE  
CONFLICT OF INTEREST DISCLOSURE FORM – FY2022**

I hereby certify that I have, or may have, a financial interest or conflicting interest as noted below. The potential conflict is with the following individual and/or organization with which the Linn-Mar CSD has, or might reasonably have in the future, a relationship with; or which Linn-Mar CSD may enter into a transaction with or compete with.

**Name of conflicting or financial interest (individual or company, etc.): Please print**

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**Reason for potential conflict (e.g. family relationship, financial relationship, etc.): Please print**

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**All facts pertinent to the conflicting or financial interest: Please print**

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I have no conflicts of interest to disclose.

I hereby certify that I have read and understand Policy 403.17-Employee Conflict of Interest, which I received a copy of, and that the above information is true, correct, and complete to the best of my knowledge, information, and belief. I further certify that I will comply with the requirements of the Employee Conflict of Interest policy.

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Employee’s Signature

Date

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Printed Name

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Superintendent’s Signature

Date

Please return this form to JT Anderson, Board Secretary/Treasurer  
2999 N 10<sup>th</sup> Street, Marion IA 52302 or via email to: jtanderson@Linnmar.k12.ia.us

**Complete additional forms for multiple conflicts/financial interests, as needed.**



## Students – Behavior and Discipline

### Policy Title: Student Complaints and Grievances Code 502.12

Creating an environment where students feel comfortable addressing their concerns in a meaningful manner is vital to the learning process. It is the goal of the board to resolve student complaints at the lowest organizational level. Student complaints and grievances regarding board policy, administrative regulations, ~~and~~ or other matters should first be addressed to the student's teacher or another licensed employee, other than the administration, for resolution of the complaint.

If the complaint cannot be resolved by the student's teacher or a licensed employee, the student may discuss the matter with the building principal within 10 days of the employee's decision. If the matter cannot be resolved by the building principal, the student may discuss it with the superintendent within 10 days after speaking with the building principal.

If the matter is not satisfactorily resolved by the superintendent, the student may request to have the matter placed on the board agenda of a regularly scheduled board meeting in compliance with board policy. The board retains discretion as to whether to consider or take action on any complaints.

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Adopted: 9/98  
Reviewed: 5/11; 4/12; 7/13; 10/14; 1/15; 10/17; 9/20  
Related Policy (Code#): 1003.3  
Legal Reference (Code of Iowa): § 279.8  
IASB Reference: 502.4



**Policy Title: Space Requirements for Open Enrollment and  
Attendance Exception Requests  
Code 602.25**

It is the goal of the district to create learning environments that encourage the growth and development of each student. Providing classrooms with an appropriate student-teacher ratio is central to achieving this goal. Insufficient classroom space exists when conditions in the district adversely affect the implementation of the district's goals and its educational program. Insufficient classroom space is determined on a case-by-case basis.

Open enrollment or other enrollment requests will be considered based upon availability of classroom space. In making its determination, the board may consider several factors including but not limited to the nature of the education program, grade level, available licensed employees, instructional method, physical space, student-teacher ratios, equipment and materials, facilities either being planned or under construction, facilities planned to be closed, financial condition of the school district, a sharing agreement in force or planned, a bargaining agreement in force, laws or rules governing special education class sizes, board-adopted school district goals and objectives, and other factors considered relevant by the board.

The enrollment requests as described will be reviewed by the board annually. It is the responsibility of the superintendent [or designee] to bring this information to the attention of the board each year.

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Adopted: 3/99

Reviewed: 5/12, 10/13, 4/15; 1/18; 2/21

Revised: 6/11

Related Policy (Code#): 501.9-10; 602.2-3; 602.7; 602.23-24; 602.26

Legal Reference (Code of Iowa): §282.18(13); 281 IAC 17.6(3)

IASB Reference: 606.6



It is the policy of the Linn-Mar Community School District to foster an equal education environment for all students, employees, and community members within the district. The purpose of this policy is to provide guidance to the district on the proper use of assistance animals while on district property. The district will allow the use of qualified service animals to accompany individuals with disabilities in all areas of district buildings where the public is normally allowed to go. This can include classrooms, cafeterias, and school buses. Individuals with disabilities are people who have a physical or mental impairment that substantially limits one or more major life activities. Service animals are dogs and in some instances miniature horses trained to do work or perform tasks for individuals with disabilities.

Service animals must be current on all required vaccinations. Service animals also must be under control while on district grounds. The animal may be under control by either the individual with the disability or a handler of the service animal. Under control means harnessed, leashed, or tethered unless these devices interfere with the animal's work, in which case under voice or other directive control.

### **Miniature Horses as Service Animals**

Miniature horses will be allowed as service animals within the district whenever it is reasonable to allow them. Factors to consider when determining reasonableness include whether the miniature horse is housebroken; whether the miniature horse is under the owner's control; whether the facility can accommodate the miniature horse's type, size, and weight; and whether the miniature horse's presence will not compromise legitimate safety requirements necessary for safe operation of the facility.

### **Establishing the Need for a Service Animal**

When no prior notice is given to the district regarding the use of a service animal, the superintendent [or designee] and/or school administrators are permitted to ask the following question: Do you need/require this animal because of a disability? If the animal's trained tasks are not readily apparent, the superintendent [or designee] and/or school administrators may ask: What work or tasks has the animal been trained to perform?

### **Service Animals In-Training**

Assuming the handler and animal are otherwise allowed, individuals who train service animals will also be allowed access with their service animal in-training to public areas of district buildings and property. The service animal in-training is expected to abide by the same requirements as fully-trained service animals.

### **Exclusion of Service Animals**

In certain limited circumstances, it may be reasonable to exclude the use of a service animal from district property. The superintendent [or designee] is permitted to exclude service animals from district buildings and property in the following circumstances: The presence of the animal poses a direct threat to the health and safety of others; the owner or handler is unable to control the animal; the animal is not housebroken; the presence of the animal significantly

disrupts or interferes with the educational process; or the presence of the animal would require a fundamental alteration to the program. If a service animal is properly excluded from district property, the district will provide the student served by the animal the opportunity to participate in the program, service, or activity without having the service animal on district property.

### **Emotional Support Animals and Therapy Animals**

Emotional support animals are medically prescribed to provide therapeutic benefits through dedicated companionship. Emotional support animals' sole function is to provide emotional support or comfort. Therapy animals are involved in an animal-assisted therapy program involving animals as a form of treatment.

Emotional support animals and therapy animals do not meet the definition of service animals. However, the district recognizes their value in the community. The superintendent [or designee] will evaluate the use of emotional support animals and therapy animals on a case-by-case basis for students.

District employees may use therapy animals in the course of their regular duties only after receiving permission from the superintendent [or designee]. For information on the use of therapy animals by district employees, refer to *Policy 604.2-Guidelines for Use of Professional Therapy Dogs*.

### **Student Use of Emotional Support Animals and Therapy Animals**

As provided by *The Americans with Disability Act*, factors the superintendent [or designee] will consider in evaluating the use of emotional support animals and therapy animals are:

- a. Whether the animal is housebroken
- b. Whether the animal is under the owner's control
- c. Whether the facility can accommodate the animal's type, size, and weight
- d. Whether the animal's presence will not compromise legitimate safety requirements necessary for safe operation of the facility

The superintendent [or designee] will also take under consideration whether the animal has a current vaccination certificate and whether the animal has been recommended through an Individual Education Plan (IEP) or 504 Plan, as necessary for the student to receive free access to public education.

If you have questions about any information provided in this policy, please contact:

Mrs. Leisa Breitfelder  
Executive Director of Student Services  
2999 N 10<sup>th</sup> Street, Marion, IA 52302  
319-447-3003 / lbreitfelder@Linnmar.k12.ia.us

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Adopted:

Related Policy (Code#): 604.2; 604.2-E1-E2

Legal Reference (Code of Iowa): §216C; 29 USC §794; 42 USC §12132; 28 CFR 35

IASB Reference: 606.3





## Staff/Personnel – All Employees

### New Policy Mandatory Policy

#### Policy Title: Employee Vaccination/Testing for COVID-19 Code 403.13

In an effort to comply with federal Occupational Safety and Health Administration (OSHA) requirements, the Linn-Mar Community School District will require all employees to become fully vaccinated against COVID-19, or in the alternative to produce weekly evidence of negative COVID-19 testing and utilize face coverings at work sites.

#### Vaccination

All employees are required to become fully vaccinated against COVID-19. Full vaccination occurs when an employee has received both primary COVID-19 vaccination doses (or one single dose if the vaccine only requires one dose) and have waited two weeks following the last dose administered. This requirement will become effective no later than January 10, 2022. Employees who have received full vaccination against COVID-19 must submit proof of vaccination no later than January 10, 2022. Employees who have not received both primary doses (if a vaccine requires a two-dose regimen) of a COVID-19 vaccine will be required to comply with the face coverings and testing requirements in the section below. Employees who have received both primary doses of the COVID-19 vaccine on or before January 10, 2022, but who have not yet passed the two-week waiting period for full vaccination efficacy are not required to comply with the face coverings and testing requirements in the section below.

#### Face Coverings and Testing

Beginning January 10, 2022, employees who do not wish to obtain vaccination against COVID-19 must wear face coverings at all times while indoors, in a vehicle, or in another enclosed space as described in detail in Policy 403.13-R1. Beginning February 9, 2022, employees who are not fully vaccinated must also provide proof of negative COVID-19 test results every seven days.

#### Reasonable Accommodations

The vaccine requirement does not apply to employees for whom a vaccine is medically contraindicated; for whom medical necessity requires a delay in vaccination; or who are legally entitled to a reasonable accommodation due to a disability or sincerely held religious beliefs, practices, or observances. If an employee requires accommodation from any other part of the policy for medical or religious reasons, the employee may request one. Qualifying employees will be expected to submit verification for one of these exemptions in order to receive an accommodation.

Employees who fail to abide by the requirements of this policy may face disciplinary action up to and including termination. It is the obligation of the superintendent [or designee] to establish appropriate procedures necessary to enforce this policy.

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Adopted:

Reviewed:

Revised:

Related Policy (Code#): 403.13-R1-R2; 403.13-E1-E3

Legal Reference (Code of Iowa): Ch 216; 29 CFR Pt 1910.501; 42 USC 12101; 42 USC 2000e; 34 CFR Pt 100; 34 CFR Pt 104

IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3



## **Staff/Personnel – All Employees Administrative Regulations Regarding Employee Vaccination/Testing for COVID-19**

**New Policy  
Code 403.13-R1**

### Acceptable Proof of Vaccination Status

To satisfy the vaccination requirement within this policy, employees must submit to Human Resources acceptable proof of vaccination status no later than January 10, 2022.

Acceptable proof of vaccination includes:

1. Immunization records from a healthcare provider or pharmacy,
2. A copy of a COVID-19 vaccination record card,
3. A copy of medical records documenting immunization,
4. A copy of immunization records from a public health, state, or tribal immunization information system,
5. Any other official documentation that contains the type of vaccine administered, dates of administration, and the name of the administering health provider or clinic, and
6. If any other records are unavailable, a signed and dated personal attestation statement.

Any employee who fails to provide acceptable proof of vaccination status may face disciplinary action up to and including termination.

### Recordkeeping

The district is required by law to keep a roster of the vaccination status of all employees. Any records showing proof of employee vaccination status the district maintained prior to January 10, 2022, will be considered sufficient proof of the employee's vaccination status.

Any records related to an employee's vaccination status, including the employee vaccination status roster, will be considered confidential employee medical records not subject to public disclosure and stored as employee medical records consistent with law. These records will be maintained by the district for as long as 29 C.F.R. 1910.501 remains in effect.

### Testing

Beginning February 9, 2022, employees who are not fully vaccinated must submit proof of negative COVID-19 test results every seven days. Documentation of negative test results must be provided to the district no later than every seven days. Employees who are not fully vaccinated and do not report to work for longer than seven days (ex. An employee on vacation or on leave) must provide documentation of a negative test result upon their return to work. If the employee fails to provide proof of negative test results, the district must keep the employee removed from the workplace until the negative test results documentation is provided.

Employees who receive a positive COVID-19 test result or have been diagnosed with COVID-19 by a licensed healthcare provider are not required to produce another test result for 90 days from the date of their positive results.

### Positive Test Results

Regardless of vaccination status, employees must report any positive COVID-19 test results or a diagnosis of COVID-19 by a licensed healthcare provider to Human Resources. Any employee so reporting will be immediately removed from the workplace and will stay removed from the workplace until any of the following occur:

- a. The employee receives a negative result on a COVID-19 nucleic acid amplification test (NAAT) following a positive result on a COVID-19 antigen test if the employee chooses to seek the confirmatory test.
- b. The employee meets the return to work criteria in the CDC's *Isolation Guidance* listed here: <https://www.cdc.gov/coronavirus/2019-ncov/your-health/quarantine-isolation.html>
- c. The employee receives a recommendation to return to work from a licensed healthcare provider.

### New Employees

New employees will be subject to the provisions of this policy upon hire as soon as practicable. Within seven days of hire, new employees will provide proof of their vaccination status to the district in accordance with the requirements of this policy. Unless fully vaccinated, new employees will abide by the testing and face covering requirements of this policy within seven days of hire.

### Leave

As required by 29 C.F.R. 1910.501, the district will provide up to four hours of paid leave to cover the time required to travel to and obtain each dose of the primary vaccination for COVID-19. If additional time is required, the employee may use other accrued leave available. The district will also provide reasonable paid sick leave to employees to recover from any effects of each primary dose of COVID-19 vaccine. The district may require employees to use previously accrued paid sick leave first.

### Employees Excluded

Employees who work fully remote from the job site; employees working from home; and employees who work exclusively outdoors are excluded from the vaccination, testing, and face covering requirements of this policy. Employees fully remote from the job site does not include employees whose work requires them to work off site from the district but in the presence of students or employees of the district. Employees who work exclusively outdoors means those individuals who do not spend any part of their work time indoors.

### Face Coverings

Beginning January 10, 2022, face coverings must be worn by all employees who have not provided proof of full vaccination status to the district. Face coverings will be worn when employees are working indoors, in vehicles, or other enclosed spaces. Face coverings are not required to be worn when employees are working alone in a room with floor-to-ceiling walls and a closed door; verifying identity for security purposes or eating/drinking; when an employee is wearing a respirator or facemask; or where the district can show that the use of a face covering is infeasible or creates a greater hazard. The face covering must fully cover the employee's nose and mouth and be replaced when wet, soiled, or damaged.

### Reporting Requirements of the District

The district will report to OSHA:

- Each work-related COVID-19 fatality within eight hours of the employer learning about the fatality, and
- Each work-related COVID-19 inpatient hospitalization within 24 hours of the employer learning about the inpatient hospitalization.

The district will report to individual employees, or anyone having written authorized consent of the employee, by the end of the next business day after the request is made:

- Documentation of any COVID-19 test results for that employee, and

- The aggregate number of fully vaccinated employees at a workplace along with the total number of employees at that workplace.

The district will also provide to the Assistant Secretary of Labor for Occupational Safety and Health, U.S. Department of Labor [or their designee]:

- A copy of this policy and the aggregate number of fully vaccinated employees at a workplace along with the total number of employees at that workplace, to be provided within four business hours of the request being made, and
- All other records and supporting documents related to this policy by the end of the next business day of the request being made.

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Adopted:

Reviewed:

Revised:

Related Policy (Code#): 403.13; 403.13-R2; 403.13-E1-E3

IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3



**Staff/Personnel – All Employees  
Required Notice to Employees Regarding  
Employee Vaccination/Testing for COVID-19**

**New Policy  
Code 403.13-R2**

For additional information on COVID-19 vaccine efficacy, safety, and the benefits of being vaccinated, please consult the following document entitled *Key Things to Know About COVID-19 Vaccines* at <https://www.cdc.gov/coronavirus/2019-ncov/vaccines/keythingstoknow.html>.

29 C.F.R. 1904.34(b)(1)(iv) prohibits the employer from discharging or in any manner discriminating against an employee for reporting a work-related injury or illness.

11(c) of the Occupational Safety and Health Act (OSH Act) prohibits the employer from discriminating against an employee for exercising rights under, or as a result of actions that are required by, this policy. 11(c) also protects employees from retaliation by the employer for filing an occupational safety or health complaint, reporting a work-related injury or illness, or otherwise exercising any rights provide by the OSH Act.

18 U.S.C. 101 and section 17(g) of the OSH Act provide for criminal penalties associated with knowingly supplying false statements or documentation in accordance with this policy.

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Adopted:

Reviewed:

Revised:

Related Policy (Code#): 403.13; 403.13-R1; 403.13-E1-E3

IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3



## Employee Personal Attestation of COVID-19 Vaccination Status

I (Print Name), \_\_\_\_\_, as an employee of the Linn-Mar Community School District do personally attest to the following:

- A. My vaccination status for COVID-19 is (Circle One): Fully vaccinated / Partially Vaccinated
- B. To the best of my recollection, I can provide the following information about my vaccination status:

\_\_\_\_\_ Type of vaccination administered  
 \_\_\_\_\_ Date(s) of administration  
 \_\_\_\_\_ Name of Health Care Provider  
 \_\_\_\_\_ Name of Clinic Site

- C. \_\_\_\_\_ I have lost proof of my vaccination status and am otherwise unable to provide proof of my vaccination status.

I declare that the information I have provided regarding my COVID-19 vaccination status is true and accurate. I understand that knowingly providing false information regarding my vaccination status on this form may subject me to criminal penalties.

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

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

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Adopted:  
 Reviewed:  
 Revised:  
 Related Policy (Code#): 403.13; 403.13-R1-R2; 403.13-E2-E3  
 IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3



## Employee Medical Accommodation Request Form Regarding COVID-19 Vaccination and/or Face Coverings

*(Please print)*

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

First & Last Name: \_\_\_\_\_

Title/Position: \_\_\_\_\_ Building: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

What is the basis for the medical accommodation you are requesting? *(Please print)*

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

What are you requesting accommodation from? *(Check all that apply)*

Vaccination for COVID-19

Testing for COVID-19

Use of Face Coverings

Individual requests for exemption from these requirements based on medical or religious grounds will be reviewed on a case-by-case basis and may involve alternative accommodations, if granted.

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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This request has been:

Approved

Denied

Administrator's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

Adopted:

Related Policy (Code#): 403.13; 403.13-R1-R2; 403.13-E1; 403.13-E3

IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3



### Employee Religious Accommodation Request Form Regarding COVID-19 Vaccination and/or Face Coverings

*(Please print)*

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

First & Last Name: \_\_\_\_\_

Title/Position: \_\_\_\_\_ Building: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Please identify the policy requirement or practice that conflicts with your sincerely-held religious observances, practices, or beliefs? *(Please print)*

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

Please describe the nature of your sincerely-held religious beliefs or religious practices or observances that conflict with the policy or practice you have identified above? *(Please print)*

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

What are you requesting accommodation from? *(Check all that apply)*

\_\_\_\_ Vaccination for COVID-19

\_\_\_\_ Testing for COVID-19

\_\_\_\_ Use of Face Coverings

Individual requests for exemption from these requirements based on medical or religious grounds will be reviewed on a case-by-case basis and may involve alternative accommodations, if granted.

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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This request has been: \_\_\_\_\_ Approved \_\_\_\_\_ Denied

Administrator's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Adopted:

Reviewed:

Related Policy (Code#): 403.13; 403.13-R1-R2; 403.13-E1-E2

IASB Reference: 403.7; 403.7R1-R2; 403.7E1-E3





Inspire Learning.  
Unlock Potential.  
Empower Achievement.

**School Board Meeting Minutes  
December 13, 2021**

**100: Call to Order and Determination of a Quorum**

The Linn-Mar School Board meeting was called to order at 5:00 PM in the boardroom of the Learning Resource Center (2999 N 10<sup>th</sup> St, Marion). Roll was taken to determine a quorum. Present: Buchholz, Morey, Nelson, Rollinger, Walker, Wall, and Weaver. Administration present: Bisgard, Anderson, Christian, Ramos, Wear, Breitfelder, and Read.

**200: Adoption of the Agenda *Motion 096-12-13***

**MOTION** by Buchholz to adopt the agenda as presented. Second by Nelson. Voice vote, all ayes. Motion carried.

**300: Public Hearings**

**301: Public Hearing** – Refer to Exhibit 601.1

The board hosted a public hearing on the 2022 Bowman Woods Elementary roof project. No comments were received.

**302: Public Hearing** – Refer to Exhibit 602.1

The board hosted a public hearing on the 2022 Echo Hill Elementary roof project. No comments were received.

**303: Public Hearing** – Refer to Exhibit 602.1

The board hosted a public hearing on the 2022 Novak Elementary roof project. No comments were received.

**304: Public Hearing** – Refer to Exhibit 604.1

The board hosted a public hearing on the 2022 Learning Resource Center roof project. No comments were received.

**400: Audience Communications**

Dave Hockett, LM Resident, shared thoughts on the potential relocation of the high school tennis courts.

**500: Informational Reports, Discussions, and Presentations**

**501: Equity & Inclusion Statement** – Exhibit 501.1

Board President Morey read a district statement on equity and inclusion.

**502: Facilities Advisory Committee** – Exhibit 502.1

High School Associate Principal Kim Buelt, Linn-Mar Parent Morgan Yarker, and Linn-Mar Junior Jacqueline Anderson presented the recommendation from the Facilities Advisory Committee

regarding future facilities planning. The committee's recommendation included the construction of another performance venue at the high school, new tennis courts near the Oak Ridge softball facility, the construction of an indoor activity center behind the high school, the construction of a new Learning Resource Center/administration building near Excelsior Middle School, and the repurposing of the current Learning Resource Center into an extension of the high school. The board will review the financial impacts of the committee's recommendation during their January 10<sup>th</sup> meeting.

503: Communications Update – Exhibit 503.1

Kevin Fry, Communications Coordinator, and Caitlin Wiedenheft, Communications Assistant, shared an overview of who they are, what they do, and where they are going. Their strategic plan will focus on improving awareness, strengthening support, and building confidence through the establishment and implementation of an effective external and internal communications plan. Linn-Mar Junior Jacqueline Anderson also shared highlights of the LMTV program.

504: Finance/Audit Committee and FY21 Audit Review – Exhibits 504.1 and 605.1

Board members Buchholz, Morey, and Weaver reported that during the December 9<sup>th</sup> Finance/Audit meeting they reviewed the financial reports, bills, 2022 capital improvement projects, bus bids, and the FY21 Annual Comprehensive Financial Report (ACFR). Mia Frommelt, CPA with Bohnsack & Frommelt, LLP, reviewed the FY21 ACFR audit report sharing that no major issues were detected.

505: Career & Technical Education Advisory Committee – Exhibit 505.1

Board members Nelson, Rollinger, and Walker reported that during the December 1<sup>st</sup> CTE meeting the group reviewed information on the Comprehensive Local Needs Assessment, heard from several CTE teachers and staff on various subjects and events, and examined the program performance relative to the Perkins Grant funding goals and priorities.

506: Marion City Council

Board President Morey reported that during the November 18<sup>th</sup> Marion City Council meeting the extensions of Tower Terrace Road and C Avenue were approved; which will have a potential for increased enrollment in the future. Board Member Buchholz reported that the December 2<sup>nd</sup> meeting was the Council's organizational meeting, which had no items pertaining to the district reported.

507: Iowa Association of School Boards Annual Conference

Board members Morey, Nelson, Rollinger, Walker, and Wall shared that they enjoyed this year's IASB conference, especially the keynote speakers. Based on some of the sessions they attended, Walker suggested adding a disclaimer to board emails to clarify that any individual communications from a board member only represent one voice and not the full board, Rollinger suggested that the Policy Committee review the district's Code of Conduct policy to make sure it addresses diversity and equity based on the stipulations in HF802, and Nelson shared ideas other districts have used to address teacher shortages. Morey reported that three of the district's four legislative priorities were adopted by the delegate assembly.

508: Superintendent's Update – Exhibit 508.1

Superintendent Bisgard drew attention to the many highlights and honors listed in the Cabinet Update, reported that the focus of the November 30<sup>th</sup> Lion Learning sessions was on Venture Academics, and that he has met with all of the district's legislative representatives in preparation for the next legislative session that begins on January 10<sup>th</sup>. Bisgard also wished those present, in-person and electronically, a happy holiday season.

## **600: Unfinished Business**

### **601: Approval of Plans and Specifications** – Exhibit 601.1 **Motion 097-12-13**

**MOTION** by Nelson to approve the plans and specifications for the 2022 Bowman Woods roof improvement project as presented. Second by Weaver. Anderson clarified that agenda items 601 thru 604 are due to the hailstorm in 2020 and that funding will be covered by insurance. Voice vote, all ayes. Motion carried.

### **602: Approval of Plans and Specifications** – Exhibit 602.1 **Motion 098-12-13**

**MOTION** by Buchholz to approve the plans and specifications for the 2022 Echo Hill roof improvement project as presented. Second by Wall. Voice vote, all ayes. Motion carried.

### **603: Approval of Plans and Specifications** – Refer to Exhibit 602.1 **Motion 099-12-13**

**MOTION** by Walker to approve the plans and specifications for the 2022 Novak roof improvement project as presented. Second by Nelson. Voice vote, all ayes. Motion carried.

### **604: Approval of Plans and Specifications** – Exhibit 604.1 **Motion 100-12-13**

**MOTION** by Wall to approve the plans and specifications for the 2022 Learning Resource Center roof improvement project as presented. Second by Nelson. Voice vote, all ayes. Motion carried.

### **605: Approval of FY21 Annual Comprehensive Financial Report** – Exhibit 605.1 **Motion 101-12-13**

**MOTION** by Weaver to approve the fiscal year 2021 Annual Comprehensive Financial Report as presented. Second by Buchholz. Voice vote, all ayes. Motion carried.

## **700: New Business**

### **701: Establishment of Public Hearing** **Motion 102-12-13**

**MOTION** by Wall to approve setting a public hearing for 5:00 PM on January 10, 2022, for approval of the plans and specifications for the Excelsior parking lot project. Second by Nelson. Voice vote, all ayes. Motion carried.

### **702: Establishment of Public Hearing** **Motion 103-12-13**

**MOTION** by Walker to approve setting a public hearing for 5:00 PM on January 10, 2022, for approval of the plans and specifications for the stadium turf replacement project. Second by Wall. Voice vote, all ayes. Motion carried.

### **703: Establishment of Public Hearing** **Motion 104-12-13**

**MOTION** by Buchholz to approve setting a public hearing for 5:00 PM on January 10, 2022, for approval of the 2022-23 school year calendar. Second by Nelson. Voice vote, all ayes. Motion carried.

### **704: Approval of FY21 SBRC Allowable Growth Request for LEP Deficit** – Exhibit 704.1 **Motion 105-12-13**

**MOTION** by Wall to approve the School Budget Review Committee fiscal year 2021 allowable growth request for the Limited English Proficiency deficit in the amount of \$334,038.18. Second by Walker. Anderson clarified this is an annual approval of an underfunded mandate. Voice vote, all ayes. Motion carried.

705: Approval of Letting of Bus Bids **Motion 106-12-13**

**MOTION** by Weaver to approve the letting of bus bids for a total cost not to exceed \$575,000.00. Second by Wall. Anderson clarified that this would cover the purchase of up to four replacement buses. Voice vote, all ayes. Motion carried.

706: Approval of Physical Education Standards Exemption **Motion 107-12-13**

**MOTION** by Buchholz to approve a Physical Education Standards Exemption for 2021-22, per CASA requirements, to teach high school physical education in a 90-minute, block, quarter format instead of the traditional semester format. Second by Walker. Bisgard clarified that this is an annual approval required by the State. Voice vote, all ayes. Motion carried.

707: Approval of High School 2022-23 Program of Studies – Exhibits 707.1-2 **Motion 108-12-13**

**MOTION** by Wall to approve the 2022-23 High School Program of Studies as presented. Second by Nelson. Voice vote, all ayes. Motion carried.

708: Approval of Fundraiser Requests – Exhibit 708.1 **Motion 109-12-13**

**MOTION** by Buchholz to approve the requested fundraisers as presented in exhibit 708.1. Second by Weaver. Voice vote, all ayes. Motion carried.

709: Approval of Early Graduation Requests – Exhibit 709.1 **Motion 110-12-13**

**MOTION** by Weaver to approve the early graduation requests as presented. Second by Buchholz. Walker congratulated the graduates. Voice vote, all ayes. Motion carried.

Baumgartner, Brianna	Little, Corbin
Crilly, Addi	Ofuasia, Olivia
Francis, Eliana	Thompson, Teeghan
Hardt, Kora	Wren, Marrassa
Ihringer, Will	

710: Approval of Open Enrollment Requests **Motion 111-12-13**

**MOTION** by Walker to approve the open enrollment requests as presented. Second by Nelson. Voice vote, all ayes. Motion carried.

**Approved IN**

Name	Grade	Resident District	Reason
Determan, Bryce	2 <sup>nd</sup>	Cedar Rapids CSD	Good cause
King, Cameron	9 <sup>th</sup>	Marion Independent	Good cause

**Approved OUT**

Name	Grade	Requested District	Reason
Delay, Cameron	9 <sup>th</sup>	Alburnett CSD	Good cause
Luedeman, Gavin	9 <sup>th</sup>	Alburnett CSD	Good cause
Schaul, Katelyn	8 <sup>th</sup>	Springville CSD	Good Cause

711: Review and Approval of Return-to-Learn Plan – Exhibit 711.1

Superintendent Bisgard reviewed the changes that were included in the board's vote on September 16<sup>th</sup> to remove the face mask mandate 60 days after the COVID vaccine was available for 5-11 year olds and that volunteers/visitors would also be allowed back into the elementary and intermediate buildings; both of which would occur beginning January 3, 2022.

**Motion 112-12-13**

**MOTION** by Buchholz to approve updating the Return-to-Learn Plan as previously reviewed. Second by Nelson. Bisgard shared a reminder that the district is required to review the Rtl Plan every six months through September 2023. Voice vote, all ayes. Motion carried.

**712: Approval of the Board Operations Manual – Exhibit 712.1 Motion 113-12-13**

**MOTION** by Buchholz to approve the 2021-22 Board Operations Manual as presented in exhibit 712.1. Second by Weaver. Board President Morey led a review of the current manual. Board members shared several suggestions for changes.

**Motion 114-12-13**

**MOTION** by Buchholz to rescind his previous motion and table the approval of the Board Operations Manual due to additional discussion needed. Second by Nelson. Voice vote, all ayes. Motion carried.

**800: Consent Agenda Motion 115-12-13**

**MOTION** by Buchholz to approve the consent agenda, as presented. Second by Wall. Voice vote, all ayes. Motion carried.

**801: Personnel**

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

Name	Assignment	Dept Action	Salary Placement
Lindsay, Camille	From .5 BW/.5 WF SS Teacher to .5 WF SS/.5 District ELL Teacher	12/6/21	Same

**Certified Staff: Resignation**

Name	Assignment	Dept Action	Reason
Porter, Jennifer	NE: Student Support Services Teacher / LOA	11/30/21	Personal

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

Name	Assignment	Dept Action	Salary Placement
Abbott, Christina	BP: Student Support Associate	12/15/21	LMSEAA II, Step 1
Baker, Kaitlyn	O&M: NE Custodian from .75 to 1.0 FTE	1/3/22	Same
Colerick, Jennifer	BW: Student Support Associate	11/11/21	LMSEAA II, Step 1
Collins, Audrey	From HS General Help to WE Satellite Manager	11/8/21	PTNS, Step 2 +.75
Gerst, Brielle	BP: Student Support Associate	12/7/21	LMSEAA II, Step 1
Grant, Anna-Lisa	WE: From Health Assistant to Student Support Associate	12/13/21	Same
Hasan, Afraa	WF: Student Support Associate	11/7/21	LMSEAA II, Step 1
Hastings, Nikki	TR: From Bus Driver to Substitute Bus Driver	11/13/21	Same
Loeffler, Tara	NS: BW General help from 3.5 to 4 hours/day	11/4/21	Same
Marotz, Zachary	NS: HS General Help from 5.5 to 7.5 hours/day	11/16/21	SEIU A, Step 1
McCloy, Jenny	EH: Part-Time Student Support Associate	12/7/21	LMSEAA II, Step 5
Rauch, Mollie	NS: BW General Help from 3.5 to 4 hours/day	11/4/21	Same
Rudd, Telisha	NS: HS General Help	11/22/21	PTNS, Step 1
Schulte, Stephen	AC: Aquatic Instructor	11/29/21	\$13.00/hour
Szczesniak, Barb	WF: Student Support Associate	11/16/21	LMSEAA II, Step 1
Williams, Robin	TR: Bus Rider	11/22/21	Step 1

**Classified Staff: Resignation**

Name	Assignment	Dept Action	Reason
Bixby, Buss	TR: Bus Rider Helper	11/2/21	Personal
Bryant, Glen	IC: Student Support Associate	12/17/21	Other Employment
Buchholz, Susan	HS: Health Assistant	11/23/21	Personal

Name	Assignment	Dept Action	Reason
Buol, Dawn	EH: Early Childhood Paraprofessional	12/22/21	Relocation
Eby, Kim	WE: Student Support Associate	12/10/21	Personal
Emery, Noreen	NS: WE General Help	11/12/21	Personal
Ihde, Courtney	EH: Part-Time Student Support Associate	11/17/21	Other Employment
Martin, Marcus	HS: Student Supervisor	11/23/21	Personal
Ocasio, Karla	LG: Student Support Associate	11/4/21	Personal
Schmitt, Julie	BP: Student Support Associate	12/22/21	Personal
Vorobtsov, Rebecca	BP: Media Assistant	11/23/21	Other Employment
Whitlock, Dori	HS: Student Support Associate	12/10/21	Personal
Woodwick, Jenna	EX: General Ed Assistant	11/19/21	Personal
Young, Annie	EX: Student Support Associate	12/22/21	Other Employment

**Co/Extra-Curricular Staff: Assignment/Reassignment/Transfer**

Name	Assignment	Dept Action	Salary Placement
Jochimsen, Mel	HS: Assistant Varsity Girls Track Coach	12/7/21	\$4,423
McConahay, Gina	EX: Choir Accompanist	11/17/21	\$2,653.80
Meehan, Abby	HS: Assistant Varsity/Head JV2 Girls Soccer Coach	3/14/22	\$3,317
Torres, Malory	HS: .5 Assistant 9 <sup>th</sup> Gr Boys Basketball Coach	11/15/21	\$1,290
Weber, Megan	HS: Assistant Varsity/Head JV Softball Coach	5/2/22	\$4,423

**802: Approval of November 10<sup>th</sup> Minutes – Exhibit 802.1**

**803: Approval of Bills – Exhibit 803.1**

**804: Approval of Contracts – Exhibits 804.1-17**

1. Farm lease with RJ Carson and Picket Fence Family Farms for 15 acres
2. Farm lease with RJ Carson and Picket Fence Family Farms for 16.57 acres
3. Farm lease with RJ Carson and Picket Fence Family Farms for 19.57 acres
4. Rental service agreement with City Laundering
5. Extended service agreement with Daktronics, Inc.
6. Agreement with Tri-City Electric for the Excelsior intercom replacement project
7. Agreement with Alliant Energy PowerHouse for graduation ceremonies 2023-2025
8. Corrected agreement with Edmentum for EdOptions Academy subscription
9. Purchase agreement with Marzano Resources for High Reliability Schools certification for Novak Elementary and Indian Creek Elementary
10. Purchase agreement with Marzano Resources for High Reliability Schools Institute for administrators in June 2022
11. Partnership agreement with Linn County Fair Association, Iowa State University Extension and Outreach, and the Linn County Agricultural Extension Council for the Linn-Mar FFA
12. Independent contractor agreement with Derek Anderson for Stories Alive
13. Independent contractor agreement with Mark Baumann for work with Wilkins choir
14. Independent contractor agreement with Ann Osborne for work with LM Orchestra
15. Independent contractor agreement with Elite Physical Therapy
16. Independent contractor agreement with Jordan Webster-Moore for work with OR show choir
17. Commercial licensing agreement with MH Advertising
18. Interagency agreements for Special Education services with Alburnett CSD (4), CAM CSD (2), Cedar Rapids CSD (2), Dubuque CSD (1), Grant Wood AEA (3), Iowa City CSD (1), North-Linn CSD (1), and Springville CSD (1). For student confidentiality, exhibits not provided.

**805: Disposition of Obsolete Equipment**

Per Iowa Code (§§ 297.22-25) and school board policy 902.6, the district will list for sale obsolete equipment and furnishings on GovDeals.com. Items for sale: Toro 722E electric start 9.00 gross torque, 205cc 22” two-stage snowblower.

**806: Informational Financial Reports – Exhibits 806.1-4**

1. School Finances and Cash Balance Reports as of October 31, 2020
2. School Finances and Cash Balance Reports as of October 31, 2021
3. School Finances and Cash Balance Reports as of November 30, 2020
4. School Finances and Cash Balance Reports as of November 30, 2021

**900: Board Communications, Calendar, and Committees**

**901: Board Communications**

Morey shared that there will be a work session immediately following the regular meeting on January 10<sup>th</sup> for a board learning session that will utilize a board self-evaluation tool provided by the Iowa Association of School Boards. Morey also shared that it is time to review the district’s Strategic Plan; which will occur during a work session in February. Wall shared information on a free college/career assessment for students and asked that consideration be given to utilizing it for students.

**902: Board Calendar**

Date	Time	Event	Location
Dec 15	11:30 AM	Policy Committee	LRC Room 5
Dec 16	5:30 PM	Marion City Council ( <i>Nelson</i> )	City Hall/Virtual
Date	Time	Event	Location
Jan 6	5:30 PM	Marion City Council ( <i>Weaver</i> )	City Hall/Virtual
Jan 10	5:00 PM	Board Meeting	LRC Boardroom/YouTube
Jan 20	7:30 AM	Finance/Audit Committee	LRC Conference Room 203
Jan 20	5:30 PM	Marion City Council ( <i>Wall</i> )	City Hall/Virtual
Jan 24	5:00 PM	Board Meeting	LRC Boardroom/YouTube
Jan 27	11:30 AM	Board Visit	Wilkins Elementary

**903: Committees and Advisories**

Committee	2021-22 Representatives
Finance/Audit Committee	Buchholz, Morey, and Weaver
Policy/Governance Committee	Morey, Nelson, and Wall
Career & Technical Education Advisory (CTE)	Nelson, Rollinger, and Walker
School Improvement Advisory Committee (SIAC)	Rollinger, Walker, and Wall

**1000: Adjournment *Motion 116-12-13***

**MOTION** by Buchholz to adjourn the meeting at 8:16 PM. Second by Wall. Voice vote, all ayes. Motion carried.

\_\_\_\_\_  
Brittania Morey, Board President

\_\_\_\_\_  
JT Anderson, Board Secretary/Treasurer



Inspire Learning.  
Unlock Potential.  
Empower Achievement.

School Board Meeting Minutes  
January 4, 2022

**100: Call to Order and Determination of a Quorum**

The Linn-Mar School Board meeting was called to order at 4:00 PM in the boardroom of the Learning Resource Center (2999 N 10<sup>th</sup> St, Marion). Present: Morey, Rollinger, Walker, Wall, and Weaver. Absent: Buchholz and Nelson. Administration Present: Bisgard, Wear, Gustason, Buelt, and Parker. Attorney Brad Kasper with Pickens, Barnes & Abernathy was also present.

**200: Adoption of the Agenda *MOTION 117-01-04***

**MOTION** by Weaver to adopt the agenda as presented. Second by Walker. Voice vote, all ayes. Motion carried.

**300: Closed Session**

**301: Motion to Move into Closed Session *MOTION 118-01-04***

**MOTION** by Wall for the board to move into closed session at 4:01 PM as provided in Section 21.5(l)(e) of Iowa Code to conduct a hearing to determine whether to suspend or expel two students. Second by Rollinger. Roll call vote, all ayes. Motion carried.

**302: Motion to Return to Open Session *MOTION 119-01-04***

**MOTION** by Wall to return to open session at 7:43 PM. Second by Walker. Roll call vote, all ayes. Motion carried.

**400: Open Session**

**401: Determination Regarding Student A *MOTION 120-01-04***

**MOTION** by Walker to take action as a result of the closed session regarding Student A, resulting in their expulsion through the end of the 2021-22 academic year with virtual learning support provided. Second by Rollinger. Roll call vote, all ayes. Motion carried.

**402: Determination Regarding Student B *MOTION 121-01-04***

**MOTION** by Rollinger to take action as a result of the closed session regarding Student B, resulting in their expulsion through the end of the 2021-22 academic year with virtual learning support provided. Second by Weaver. Roll call vote, all ayes. Motion carried.

**500: Adjournment *MOTION 122-01-04***

**MOTION** by Weaver to adjourn the meeting at 7:45 PM. Second by Rollinger. Voice vote, all ayes. Motion carried.

\_\_\_\_\_  
Brittania Morey, Board President

\_\_\_\_\_  
JT Anderson, Board Secretary/Treasurer



## Linn-Mar Community School District

## IA - Warrants Paid Listing

Criteria

Date Range: 12/10/2021 - 01/06/2022

Fiscal Year: 2021-2022

Vendor Name	Description	Check Total
<b>Fund: AQUATIC CENTER</b>		
BMO MASTERCARD	GENERAL SUPPLIES	\$2,224.00
BMO MASTERCARD	TRAVEL	\$503.50
FARMERS STATE BANK	EE LIAB-DIR DEP NET PAY	\$4,280.88
INTERNAL REVENUE SERVICE-9343	EE LIAB-MEDICARE	\$89.13
INTERNAL REVENUE SERVICE-9343	EE LIAB-SO SEC	\$381.16
INTERNAL REVENUE SERVICE-9343	ER LIAB-MEDICARE	\$89.13
INTERNAL REVENUE SERVICE-9343	ER LIAB-SOC SEC	\$381.16
INTERNAL REVENUE SERVICE-9343	FEDERAL INCOME TAX WITHHOLDING	\$546.65
IOWA PUBLIC EMPL RETIR SYSTEM	EE LIAB-IPERS	\$329.34
IOWA PUBLIC EMPL RETIR SYSTEM	ER LIAB-IPERS	\$494.29
IOWA SWIMMING, INC (DES MOINES)	GENERAL SUPPLIES	\$1,580.00
MADISON NATIONAL LIFE INS. CO., INC	DISTRICT LIFE INSURANCE	\$5.00
MADISON NATIONAL LIFE INS. CO., INC	ER LIAB-DISTRICT DISABILITY	\$9.74
METRO INTERAGENCY INS PROG.	EE LIAB-MEDICAL INSURANCE	\$342.00
METRO INTERAGENCY INS PROG.	ER LIAB-DENTAL INS	\$40.40
TREASURER ST OF IA	STATE INCOME TAX WITHHOLDING	\$184.87
USA SWIMMING/IOWA SWIMMING, INC	GENERAL SUPPLIES	\$75.00
	<b>Fund Total:</b>	<b>\$11,556.25</b>
<b>Fund: DEBT SERVICE</b>		
TRUIST GOVERNMENTAL FINANCE	INTEREST	\$77,712.76
UMB BANK, N.A.	INTEREST	\$579,847.38
	<b>Fund Total:</b>	<b>\$657,560.14</b>
<b>Fund: GENERAL</b>		
ABILITY PHYSICAL THERAPY, P.C.	INSTRUCTIONAL SUPPLIES	\$2,780.00
ACUTRANS	INSTRUCTIONAL SUPPLIES	\$330.75
ADVANCE AUTO PARTS	TRANSP. PARTS	\$85.02
AGVANTAGE FS	PROPANE	\$5,559.12
AHLERS AND COONEY, P.C.	LEGAL SERVICES	\$1,570.00
AIRGAS NORTH CENTRAL	INSTRUCTIONAL SUPPLIES	\$275.88
ALLIANT ENERGY	ELECTRICITY	\$97,047.67
AMBROSY TODD	OFFICIAL/JUDGE	\$60.00
AMERICAN SPECIALTIES	OTHER PROFESSIONAL	\$5.29
ARNOLD MOTOR SUPPLY	MAINTENANCE SUPPLIES	\$296.64
ASAVIE TECHNOLOGIES/AKAMAI TECHNOLOGIES	INTERNET- COVID RELATED	\$146.00
ASIFLEX	EE LIAB-FLEX DEP CARE	\$14,138.71
ASIFLEX	EE LIAB-FLEX HEALTH	\$21,138.30
ASIFLEX	OTHER PROFESSIONAL	\$750.75
ATLANTIC COCA-COLA	INSTRUCTIONAL SUPPLIES	\$946.00
ATTAINMENT COMPANY INC	INSTRUCTIONAL SUPPLIES	\$3,785.25
BALANCE AUTISM	INSTRUCTIONAL SUPPLIES	\$236.25
BARNARD INSTRUMENT REPAIR, INC	EQUIPMENT REPAIR	\$375.00
BARNARD INSTRUMENT REPAIR, INC	INSTRUCTIONAL SUPPLIES	\$329.32
BIRDBRAIN TECHNOLOGIES LLC	INSTRUCTIONAL SUPPLIES	\$3,570.00

## Linn-Mar Community School District

### IA - Warrants Paid Listing

Criteria

Date Range: 12/10/2021 - 01/06/2022

Fiscal Year: 2021-2022

Vendor Name	Description	Check Total
BLANK PARK ZOO	INSTRUCTIONAL SUPPLIES	\$100.00
BMO MASTERCARD	COMP/TECH HARDWARE	\$4,252.16
BMO MASTERCARD	COMPUTER SOFTWARE	\$1,180.81
BMO MASTERCARD	DUES AND FEES	\$1,129.36
BMO MASTERCARD	EQUIPMENT >\$5,000	\$0.00
BMO MASTERCARD	GARBAGE COLLECTION	\$6,325.87
BMO MASTERCARD	GASOLINE	\$58.98
BMO MASTERCARD	GENERAL SUPPLIES	\$7,817.85
BMO MASTERCARD	INSTRUCTIONAL SUPPLIES	\$34,113.76
BMO MASTERCARD	LIBRARY BOOKS	\$3,153.58
BMO MASTERCARD	OTHER PROFESSIONAL	\$321.11
BMO MASTERCARD	POSTAGE/UPS	\$4.30
BMO MASTERCARD	Professional Educational Services	\$174.55
BMO MASTERCARD	STAFF TRAVEL	\$1,259.37
BMO MASTERCARD	STAFF WORKSH/CONF	\$827.40
BMO MASTERCARD	TRAVEL	\$16,691.85
C.J. COOPER & ASSOCIATES	DRUG TESTING	\$60.00
C.J. COOPER & ASSOCIATES	PHYSICALS	\$180.00
C.R. GLASS CO	REPAIR/MAINT SERVICE	\$29.55
CAMBIUM ASSESSMENT, INC	INSTRUCTIONAL SUPPLIES	\$4,011.00
CAPITAL ONE	GENERAL SUPPLIES	\$267.40
CAPITAL ONE	INSTRUCTIONAL SUPPLIES	\$231.03
CAPITAL SANITARY	MAINTENANCE SUPPLIES	\$2,989.51
CEDAR RAPIDS COMM SCH DIST	PROF SERV: EDUCATION	\$313.28
CEDAR RAPIDS WATER DEPT	WATER/SEWER	\$1,124.70
CEDAR VALLEY WORLD TRAVEL	TRANSP PRIVATE CONT	\$12,035.00
CENTRAL STATES BUS SALES INC	TRANSP. PARTS	\$1,983.04
CENTURYLINK	TELEPHONE	\$2,590.01
CHIROPRACTIC OF IOWA	PHYSICALS	\$100.00
CITY OF MARION.	OTHER PROFESSIONAL	\$87.72
CMS COMMUNICATIONS	COMP/TECH HARDWARE	\$1,945.48
COLLECTION	EE LIAB-GARNISHMENTS	\$3,425.49
COMMUNICATIONS ENGINEERING CO	GENERAL SUPPLIES	\$380.00
CROWBAR'S	TRANSP. PARTS	\$17.00
DIVISION OF LABOR-ELEVATOR SAFETY	OTHER PROFESSIONAL	\$1,365.00
ELECTRONIC ENGINEERING CO	GENERAL SUPPLIES	\$478.00
ELECTRONIC ENGINEERING CO	RADIOS	\$835.00
EMPLOYEE RESOURCE SYSTEMS, INC	OTHER PROFESSIONAL	\$1,779.39
F & B CAB CO., INC	TRANSP PRIVATE CONT	\$914.00
FAREWAY STORES	INSTRUCTIONAL SUPPLIES	\$287.54
FARMERS STATE BANK	EE LIAB-DIR DEP NET PAY	\$3,728,696.42
FLYLEAF PUBLISHING, LLC	INSTRUCTIONAL SUPPLIES	\$173.34
FOLLETT SCHOOL SOLUTIONS, INC	LIBRARY BOOKS	\$500.77
FOUR OAKS FAMILY & CHILDREN'S SERVICES	PROF SERV: EDUCATION	\$21,034.50
GASWAY CO, J P	GENERAL SUPPLIES	\$703.35

## Linn-Mar Community School District

### IA - Warrants Paid Listing

Criteria

Date Range: 12/10/2021 - 01/06/2022

Fiscal Year: 2021-2022

Vendor Name	Description	Check Total
GAZETTE COMMUNICATIONS INC	ADVERTISING	\$636.44
GRAINGER	GENERAL SUPPLIES	\$600.00
GRAINGER	MAINTENANCE SUPPLIES	\$290.51
GRANT WOOD AEA	GENERAL SUPPLIES	\$13.00
GRANT WOOD AEA	INSTRUCTIONAL SUPPLIES	\$734.92
GRANT WOOD AEA	OTHER PROFESSIONAL	\$102.80
GRANT WOOD AEA	Professional Educational Services	\$123,600.00
GREAT MINDS PBC	INSTRUCTIONAL SUPPLIES	\$3,000.00
GREENWOOD CLEANING SYSTEMS	MAINTENANCE SUPPLIES	\$10,354.69
HIGH NOON BOOKS	INSTRUCTIONAL SUPPLIES	\$554.40
HOGLUND BUS CO. INC	TRANSP. PARTS	\$534.90
HUK RUBBER STAMP CO.	GENERAL SUPPLIES	\$35.95
HY-VEE FOOD STORE-8555	INSTRUCTIONAL SUPPLIES	\$187.40
HY-VEE FOOD STORE-8556	INSTRUCTIONAL SUPPLIES	\$872.27
IASB	DUES AND FEES	\$2,340.00
INTERNAL REVENUE SERVICE-9343	EE LIAB-MEDICARE	\$75,371.03
INTERNAL REVENUE SERVICE-9343	EE LIAB-SO SEC	\$319,135.63
INTERNAL REVENUE SERVICE-9343	ER LIAB-MEDICARE	\$75,191.52
INTERNAL REVENUE SERVICE-9343	ER LIAB-SOC SEC	\$319,135.63
INTERNAL REVENUE SERVICE-9343	FEDERAL INCOME TAX WITHHOLDING	\$428,368.32
INTERSTATE BATTERIES OF UPPER IA	TRANSP. PARTS	\$58.95
IOWA CHORAL DIRECTORS ASSN.	INSTRUCTIONAL SUPPLIES	\$228.00
IOWA CITY COMMUNITY SCHOOLS	PROF SERV: EDUCATION	\$614.46
IOWA DEPT OF NATURAL RESOURCES	DUES AND FEES	\$130.00
IOWA DEPT OF REVENUE - ADMIN WAGE LEVY	EE LIAB-GARNISHMENTS	\$610.53
IOWA PUBLIC EMPL RETIR SYSTEM	EE LIAB-IPERS	\$340,984.76
IOWA PUBLIC EMPL RETIR SYSTEM	ER LIAB-IPERS	\$511,748.25
IOWA SHARES	EE LIAB-CHARITY	\$23.00
JASCHEN JON	OFFICIAL/JUDGE	\$60.00
JOHN DEERE FINANCIAL	GENERAL SUPPLIES	\$7.99
JOHN DEERE FINANCIAL	SHOP TOOLS/EQUIPMENT	\$49.53
JOHNSTONE SUPPLY	REPAIR PARTS	\$1,428.29
JVA MOBILITY	INSTRUCTIONAL SUPPLIES	\$6,612.00
KIRKWOOD COMM COLLEGE	TUITION-COMM COLLEGE	\$12,572.00
KOSIKAS HEATHER	INSTRUCTIONAL SUPPLIES	\$33.00
LEARNING A-Z	INSTRUCTIONAL SUPPLIES	\$354.00
LETTER PERFECT	GENERAL SUPPLIES	\$95.60
LINN COUNTY SHERIFF	EE LIAB-GARNISHMENTS	\$0.69
LINN-MAR FOUNDATION	EE LIAB-CHARITY	\$606.83
LUCK'S MUSIC LIBRARY	INSTRUCTIONAL SUPPLIES	\$121.71
MADISON NATIONAL LIFE INS. CO., INC	DISTRICT LIFE INSURANCE	\$5,736.50
MADISON NATIONAL LIFE INS. CO., INC	ER LIAB-DISTRICT DISABILITY	\$10,592.09
MADISON NATIONAL LIFE INS. CO., INC	RETIREE INSURANCE	(\$232.00)
MALLOY PIANO SERVICES	INSTRUCTIONAL SUPPLIES	\$450.00
MARCO TECHNOLOGIES, LLC	Copies	\$9,072.12



## Linn-Mar Community School District

### IA - Warrants Paid Listing

Criteria

Date Range: 12/10/2021 - 01/06/2022

Fiscal Year: 2021-2022

Vendor Name	Description	Check Total
MARCO TECHNOLOGIES, LLC	GENERAL SUPPLIES	\$543.51
MARION INDEPENDENT SCHOOLS	INSTRUCTIONAL SUPPLIES	\$195.00
MARION JANITORIAL SUPPLY CO	MAINTENANCE SUPPLIES	\$719.66
MARION JANITORIAL SUPPLY CO	SHOP TOOLS/EQUIPMENT	\$59.08
MARION WATER DEPT	WATER/SEWER	\$9,174.40
MARK BAUMAN	INSTRUCTIONAL SUPPLIES	\$100.00
MARK SEAMANS	SHOP TOOLS/EQUIPMENT	\$199.50
MARZANO RESOURCES LLC	PROF SERV: EDUCATION	\$3,960.00
MARZANO RESOURCES LLC	Professional Educational Services	\$17,914.00
MARZANO RESOURCES LLC	STAFF WORKSH/CONF	\$1,650.00
MCBRIDE CHRYSANN	Professional Educational Services	\$5,586.78
MCMASTER-CARR	MAINTENANCE SUPPLIES	\$120.20
MEDCO SUPPLY	PROF SERV: EDUCATION	\$9.02
MEDIACOM	INTERNET- COVID RELATED	\$487.55
MEDIACOM	TELEPHONE	\$276.90
MENARDS -13127	GENERAL SUPPLIES	\$837.79
MENARDS -13127	INSTRUCTIONAL SUPPLIES	\$948.86
MENDEZ FOUNDATION	INSTRUCTIONAL SUPPLIES	\$477.33
METRO INTERAGENCY INS PROG.	EE LIAB-DENTAL INSURANCE	\$25,964.46
METRO INTERAGENCY INS PROG.	EE LIAB-MEDICAL INSURANCE	\$578,290.92
METRO INTERAGENCY INS PROG.	ER LIAB-DENTAL INS	\$21,391.79
METRO INTERAGENCY INS PROG.	ER LIAB-MEDICAL INSURANCE	\$27,550.00
METRO INTERAGENCY INS PROG.	RETIREE INSURANCE	\$27,445.28
MH EQUIPMENT COMPANY	REPAIR/MAINT SERVICE	\$759.12
MID AMERICAN ENERGY	NATURAL GAS	\$13,481.21
MIDAMERICAN ENERGY SERVICES, LLC	NATURAL GAS	\$7,640.21
MIDWAY OUTDOOR EQUIPMENT INC	REPAIR/MAINT SERVICE	\$526.36
MIDWEST ALARM SERVICES	OTHER PROFESSIONAL	\$1,399.92
MILLER JASON	OFFICIAL/JUDGE	\$60.00
MOREY BRITTANIA	TRAVEL	\$73.71
NAPA AUTO PARTS	TRANSP. PARTS	\$157.50
NATIONAL COUNCIL FOR BEHAVIORAL HEALTH	INSTRUCTIONAL SUPPLIES	\$39.90
NEIBA	INSTRUCTIONAL SUPPLIES	\$50.00
NELSON, SONDR	TRAVEL	\$132.03
NOTEWORTHY MUSIC SERVICES, INC	GENERAL SUPPLIES	\$20.00
NOTEWORTHY MUSIC SERVICES, INC	INSTRUCTIONAL SUPPLIES	\$140.00
OBERBROECKLING CHRIS	OFFICIAL/JUDGE	\$60.00
OFFICE OF AUDITOR OF STATE	OTHER PROFESSIONAL	\$850.00
ORKIN PEST CONTROL	Pest Control	\$650.00
OSBORNE ANN MARIE	Professional Educational Services	\$300.00
P & K MIDWEST	REPAIR PARTS	\$29.79
PAPA JOHNS PIZZA	INSTRUCTIONAL SUPPLIES	\$448.50
PAUL REVERE LIFE INS. CO.	DISTRICT LIFE INSURANCE	\$234.00
PEERBOLTE CREATIVE LLC	REPAIR/MAINT SERVICE	\$3,000.00
PEIFFER RON	OFFICIAL/JUDGE	\$60.00

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Vendor Name	Description	Check Total
PEPPER J.W. & SON, INC	INSTRUCTIONAL SUPPLIES	\$513.62
POWERSCHOOL GROUP LLC	COMPUTER SOFTWARE	\$30,830.70
PROVIDENT LIFE/ACCIDENT INS. CO.	DISTRICT LIFE INSURANCE	\$3,104.11
QUILL CORPORATION	INSTRUCTIONAL SUPPLIES	\$74.89
QUINN STORAGE	GENERAL SUPPLIES	\$180.00
READ BOB	TRAVEL	\$10.00
RECYCLING COMPLIANCE SPECIALISTS LLC	OTHER PROFESSIONAL	\$483.60
RIFTON	INSTRUCTIONAL SUPPLIES	\$322.50
ROCHESTER ARMORED CAR CO INC	GENERAL SUPPLIES	\$596.44
ROTO-ROOTER	SHOP TOOLS/EQUIPMENT	\$1,142.40
ROYAL IMAGING SUPPLIES	GENERAL SUPPLIES	\$282.00
ROYAL IMAGING SUPPLIES	INSTRUCTIONAL SUPPLIES	\$142.60
SADLER POWER TRAIN	TRANSP. PARTS	\$590.34
SCHOOL HEALTH CORP	INSTRUCTIONAL SUPPLIES	\$165.30
SCHOOL SPECIALTY LLC	INSTRUCTIONAL SUPPLIES	\$67.05
SCHULTZ STRINGS INC	EQUIPMENT REPAIR	\$594.75
SCHULTZ STRINGS INC	INSTRUCTIONAL SUPPLIES	\$165.75
SHERWIN-WILLIAMS	INSTRUCTIONAL SUPPLIES	\$203.75
SOURCE ONE LOGOS	INSTRUCTIONAL SUPPLIES	\$496.00
SPHERO, INC	INSTRUCTIONAL SUPPLIES	\$4,561.30
SULLIVAN BRENDAN	OFFICIAL/JUDGE	\$60.00
SUN LIFE FINANCIAL EBG	EE LIAB-VOL/SUN LIFE INS	\$4,050.00
SWANK MOVIE LICENSING USA	GENERAL SUPPLIES	\$576.00
SYNOVIA SOLUTIONS, LLC	GENERAL SOFTWARE	\$288.35
TEGELER WRECKER & CRANE	GENERAL SUPPLIES	\$250.00
THE CURIOSITY PATH,LLC	INSTRUCTIONAL SUPPLIES	\$240.00
THE PAPER CORPORATION	GENERAL SUPPLIES	\$5,138.78
THE SHREDDER	OTHER PROFESSIONAL	\$252.00
THINK SAFE INC	GENERAL SUPPLIES	\$609.00
THOMPSON TRUCK & TRAILER	TRANSP. PARTS	\$350.33
TOOLS 4 READING, LLC	INSTRUCTIONAL SUPPLIES	\$150.00
TREASURER ST OF IA	STATE INCOME TAX WITHHOLDING	\$205,116.25
TRI-CITY ELECTRIC COMPANY OF IOWA	COMP/TECH HARDWARE	\$1,542.85
TRUCK BUILDERS	VEHICLE REPAIR	\$203.00
U.S. CELLULAR	TELEPHONE	\$197.50
UNITED WAY OF EAST CENTRAL IOWA	EE LIAB-CHARITY	\$277.89
UNUM LIFE INS. CO.	ER LIAB-DISTRICT DISABILITY	\$1,140.67
VALUE INSPIRED PRODUCTS/SERVICES	INSTRUCTIONAL SUPPLIES	\$2,383.00
VERIZON WIRELESS	INTERNET- COVID RELATED	\$3,845.60
VERIZON WIRELESS	TELEPHONE	\$443.86
VOYA RETIREMENT INSURANCE	EE LIAB-403 (B)	\$79,491.73
WALL RACHEL	TRAVEL	\$85.80
WEBSTER-MOORE, JORDAN	INSTRUCTIONAL SUPPLIES	\$300.00
WENDLING QUARRIES	GROUPS UPKEEP	\$50.00
WEST MUSIC CO	EQUIPMENT REPAIR	\$1,270.12

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WEST MUSIC CO	INSTRUCTIONAL SUPPLIES	\$1,690.01
WIELAND & SONS LUMBER CO	INSTRUCTIONAL SUPPLIES	\$1,000.00
WISE STEVE	OFFICIAL/JUDGE	\$60.00
YANECEK DOUG	OFFICIAL/JUDGE	\$120.00
YUSKA BILLY	OFFICIAL/JUDGE	\$60.00
ZANER BLOSER	INSTRUCTIONAL SUPPLIES	\$37,310.70
ZIPPY' S SALT BARN LLC	GROUNDS UPKEEP	\$3,847.72
<b>Fund Total:</b>		<b>\$7,433,334.67</b>
<b>Fund: LOCAL OPT SALES TAX</b>		
TRAVERSE LANDSCAPE ARCHITECTS, LLC	ARCHITECT	\$1,226.25
TRI-CITY ELECTRIC COMPANY OF IOWA	CONSTRUCTION SERV	\$1,206.30
<b>Fund Total:</b>		<b>\$2,432.55</b>
<b>Fund: NUTRITION SERVICES</b>		
COLLECTION	EE LIAB-GARNISHMENTS	\$436.80
FARMERS STATE BANK	EE LIAB-DIR DEP NET PAY	\$114,521.50
INTERNAL REVENUE SERVICE-9343	EE LIAB-MEDICARE	\$2,204.74
INTERNAL REVENUE SERVICE-9343	EE LIAB-SO SEC	\$9,426.83
INTERNAL REVENUE SERVICE-9343	ER LIAB-MEDICARE	\$2,204.74
INTERNAL REVENUE SERVICE-9343	ER LIAB-SOC SEC	\$9,426.83
INTERNAL REVENUE SERVICE-9343	FEDERAL INCOME TAX WITHHOLDING	\$7,470.93
IOWA PUBLIC EMPL RETIR SYSTEM	EE LIAB-IPERS	\$10,103.21
IOWA PUBLIC EMPL RETIR SYSTEM	ER LIAB-IPERS	\$15,162.93
LYNCH HOLLY	UNEARNED REVENUE	\$799.10
MADISON NATIONAL LIFE INS. CO., INC	DISTRICT LIFE INSURANCE	\$177.50
MADISON NATIONAL LIFE INS. CO., INC	ER LIAB-DISTRICT DISABILITY	\$185.68
MARCO TECHNOLOGIES, LLC	Copies	\$4.14
MARTIN BROTHERS DISTRIBUTING CO., INC	PURCHASE FOOD	\$34,423.56
METRO INTERAGENCY INS PROG.	EE LIAB-MEDICAL INSURANCE	\$21,119.86
PAN-O-GOLD BAKING CO.	PURCHASE FOOD	\$2,578.02
REINHART INSTITUTIONAL FOODS INC	GENERAL SUPPLIES	\$5,965.67
REINHART INSTITUTIONAL FOODS INC	PURCHASE FOOD	\$39,139.42
TREASURER ST OF IA	STATE INCOME TAX WITHHOLDING	\$4,022.97
VOYA RETIREMENT INSURANCE	EE LIAB-403 (B)	\$620.00
<b>Fund Total:</b>		<b>\$279,994.43</b>
<b>Fund: PHY PLANT &amp; EQ LEVY</b>		
APPLEBY & HORN	CONSTRUCTION SERV	\$542.30
ASSETWORKS INC.	COMPUTER SOFTWARE	\$1,980.00
CULVER'S CORRIDOR STORAGE, LLC	COVID STORAGE LEASE	\$3,000.00
DE LAGE LANDEN PUBLIC FINANCE	COMPUTER/COPIER RENT	\$5,194.70
DRYSACE INC	CONSTRUCTION SERV	\$387.61
EMPOWERED PROPERTIES, LLC	FACILITY RENTAL	\$3,500.00
HAWKEYE ELECTRICAL CONTRACTORS	CONSTRUCTION SERV	\$14,221.20
MENARDS -13127	CONSTRUCTION SERV	\$13,101.47
SHIVE-HATTERY INC.	ARCHITECT	\$7,000.00



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Vendor Name	Description	Check Total
SHIVE-HATTERY INC.	CONSTRUCTION SERV	\$3,151.40
TEGELER WRECKER & CRANE	EQUIPMENT >\$5,000	\$7,100.21
TRANSFINDER CORPORATION	COMPUTER SOFTWARE	\$2,200.00
TRI-STATE AUTOMATIC SPRINKLER INC	CONSTRUCTION SERV	\$1,322.00
TRUCK BUILDERS	EQUIPMENT >\$5,000	\$3,085.99
TRUCK COUNTRY OF IOWA	EQUIPMENT >\$5,000	\$6,797.45
<b>Fund Total:</b>		<b>\$72,584.33</b>
<b>Fund: PUB ED &amp; REC LEVY</b>		
FARMERS STATE BANK	EE LIAB-DIR DEP NET PAY	\$1,678.15
INTERNAL REVENUE SERVICE-9343	EE LIAB-MEDICARE	\$32.66
INTERNAL REVENUE SERVICE-9343	EE LIAB-SO SEC	\$139.67
INTERNAL REVENUE SERVICE-9343	ER LIAB-MEDICARE	\$32.66
INTERNAL REVENUE SERVICE-9343	ER LIAB-SOC SEC	\$139.67
INTERNAL REVENUE SERVICE-9343	FEDERAL INCOME TAX WITHHOLDING	\$172.41
IOWA PUBLIC EMPL RETIR SYSTEM	EE LIAB-IPERS	\$169.62
IOWA PUBLIC EMPL RETIR SYSTEM	ER LIAB-IPERS	\$254.56
MADISON NATIONAL LIFE INS. CO., INC	DISTRICT LIFE INSURANCE	\$2.50
MADISON NATIONAL LIFE INS. CO., INC	ER LIAB-DISTRICT DISABILITY	\$5.62
METRO INTERAGENCY INS PROG.	EE LIAB-DENTAL INSURANCE	\$24.98
METRO INTERAGENCY INS PROG.	EE LIAB-MEDICAL INSURANCE	\$467.50
METRO INTERAGENCY INS PROG.	ER LIAB-DENTAL INS	\$20.21
THE WELD WORX	GROUNDS UPKEEP	\$135.00
TREASURER ST OF IA	STATE INCOME TAX WITHHOLDING	\$77.86
<b>Fund Total:</b>		<b>\$3,353.07</b>
<b>Fund: SALES TAX REVENUE BOND CAP PROJECT</b>		
HALL & HALL ENGINEERS INC	ARCHITECT	\$7,200.00
<b>Fund Total:</b>		<b>\$7,200.00</b>
<b>Fund: STUDENT ACTIVITY</b>		
AMBROSY TODD	OFFICIAL/JUDGE	\$90.00
AMY WHITE PHOTOGRAPHY	INSTRUCTIONAL SUPPLIES	\$675.00
APPAREL 1	INSTRUCTIONAL SUPPLIES	\$450.00
BARNES KERRY	OFFICIAL/JUDGE	\$75.00
BARTA BOB	OFFICIAL/JUDGE	\$80.00
BMO MASTERCARD	INSTRUCTIONAL SUPPLIES	\$11,240.29
BMO MASTERCARD	TRAVEL	\$3,102.43
BOOSTER CLUB	INSTRUCTIONAL SUPPLIES	\$207.60
BRANDT BLAKE	OFFICIAL/JUDGE	\$100.00
CAPITAL ONE	INSTRUCTIONAL SUPPLIES	\$52.86
CEDAR RAPIDS ATHLETIC OFFICIALS	INSTRUCTIONAL SUPPLIES	\$175.00
CEDAR RAPIDS ATHLETIC OFFICIALS	OFFICIAL/JUDGE	\$550.00
COOPER STEPHEN	OFFICIAL/JUDGE	\$145.00
COTTON GALLERY LTD.	INSTRUCTIONAL SUPPLIES	\$795.88
COTTRELL PHIL	OFFICIAL/JUDGE	\$120.00
DANIEL GRAWE	OFFICIAL/JUDGE	\$100.00

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Vendor Name	Description	Check Total
DIGMANN LORAS	OFFICIAL/JUDGE	\$134.50
DIVIS ETHAN	OFFICIAL/JUDGE	\$55.00
DONNER MATTHEW	OFFICIAL/JUDGE	\$120.00
DUGGAN CHRIS	OFFICIAL/JUDGE	\$150.00
DUGGAN KYLE	OFFICIAL/JUDGE	\$400.00
DUMOLIEN JORDAN	OFFICIAL/JUDGE	\$55.00
DVORAK JOHN	OFFICIAL/JUDGE	\$55.00
ELSMORE SWIM SHOP/AQUATIC	INSTRUCTIONAL SUPPLIES	\$52.50
ENSMINGER PATRICK	OFFICIAL/JUDGE	\$241.46
FARMERS STATE BANK	EE LIAB-DIR DEP NET PAY	\$3,832.40
FARMTEK	INSTRUCTIONAL SUPPLIES	\$524.99
FEDERER MICHAEL	OFFICIAL/JUDGE	\$65.00
FLOOD KEVIN	OFFICIAL/JUDGE	\$175.00
GIRDNER JOEL	OFFICIAL/JUDGE	\$100.00
GRANT WOOD AEA	INSTRUCTIONAL SUPPLIES	\$53.48
GRIFFITHS FRED	OFFICIAL/JUDGE	\$62.36
GRIMM VAUGHN	OFFICIAL/JUDGE	\$100.00
HARTL JEFF	OFFICIAL/JUDGE	\$100.00
HARTWIG RON	OFFICIAL/JUDGE	\$70.00
HEIDELBAUER CHRISTOPHER	OFFICIAL/JUDGE	\$55.00
HEITKAMP MARK	OFFICIAL/JUDGE	\$127.14
HOSA-FUTURE HEALTH PROFESSIONALS	DUES AND FEES	\$24.00
HOYT BOB	OFFICIAL/JUDGE	\$150.00
HUNTERS RIDGE GOLF COURSE	INSTRUCTIONAL SUPPLIES	\$979.67
INTERNAL REVENUE SERVICE-9343	EE LIAB-MEDICARE	\$64.63
INTERNAL REVENUE SERVICE-9343	EE LIAB-SO SEC	\$276.52
INTERNAL REVENUE SERVICE-9343	ER LIAB-MEDICARE	\$64.63
INTERNAL REVENUE SERVICE-9343	ER LIAB-SOC SEC	\$276.52
INTERNAL REVENUE SERVICE-9343	FEDERAL INCOME TAX WITHHOLDING	\$267.71
INTERSTATE DECAL	INSTRUCTIONAL SUPPLIES	\$506.00
IOWA HIGH SCHOOL SPEECH ASSOC	INSTRUCTIONAL SUPPLIES	\$148.00
IOWA HS BASEBALL COACHES ASSN	DUES AND FEES	\$250.00
IOWA PUBLIC EMPL RETIR SYSTEM	EE LIAB-IPERS	\$234.92
IOWA PUBLIC EMPL RETIR SYSTEM	ER LIAB-IPERS	\$352.54
KALVIG MICHAEL	OFFICIAL/JUDGE	\$146.92
KAUFMAN ADAM	OFFICIAL/JUDGE	\$128.00
KLOSTERMANN KEVIN	OFFICIAL/JUDGE	\$65.00
KNICKREHM DOUG	OFFICIAL/JUDGE	\$124.84
LINN-MAR BASKETBALL ACADEMY	OTHER ACT INCOME	\$600.00
LUENSE BRET	OFFICIAL/JUDGE	\$145.00
MACKEY, THOMAS	INSTRUCTIONAL SUPPLIES	\$200.00
MAJOR RONALD	OFFICIAL/JUDGE	\$120.00
MCMASTER-CARR	INSTRUCTIONAL SUPPLIES	\$15.40
MENARDS -13127	INSTRUCTIONAL SUPPLIES	\$68.91
MH ADVERTISING SPECIALTIES	INSTRUCTIONAL SUPPLIES	\$1,185.00



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Vendor Name	Description	Check Total
MINN-TEX CITRUS	DUES AND FEES	\$50.60
MINN-TEX CITRUS	INSTRUCTIONAL SUPPLIES	\$2,097.50
MORRISON DALE	OFFICIAL/JUDGE	\$55.00
NATIONAL FFA ORGANIZATION	INSTRUCTIONAL SUPPLIES	\$121.00
NEIBA	INSTRUCTIONAL SUPPLIES	\$200.00
NEPPLE KENNETH	OTHER ACT INCOME	\$150.00
PATIK KIM	OFFICIAL/JUDGE	\$64.20
PEEPLER JAMAAL	OFFICIAL/JUDGE	\$70.00
PEIFFER RON	OFFICIAL/JUDGE	\$55.00
PEPPER J.W. & SON, INC	INSTRUCTIONAL SUPPLIES	\$70.00
PIKOKIVAKA OLIVIA	OTHER ACT INCOME	\$150.00
R & D EVENTS AND RENTAL LLC	INSTRUCTIONAL SUPPLIES	\$4,498.30
RAGAR JOSH	OFFICIAL/JUDGE	\$100.00
READ PHOTOGRAPHY	INSTRUCTIONAL SUPPLIES	\$190.00
RECKER CHAD	OFFICIAL/JUDGE	\$335.00
REPKO MIKE	OFFICIAL/JUDGE	\$95.00
RIDDELL ALL-AMERICAN	INSTRUCTIONAL SUPPLIES	\$544.98
ROEN JEFFREY	OFFICIAL/JUDGE	\$100.00
SCHAUF ANDREW	OFFICIAL/JUDGE	\$65.00
SHANLEY STEVE	INSTRUCTIONAL SUPPLIES	\$400.00
SHULL MATT	OFFICIAL/JUDGE	\$200.00
SLESSOR CAITLUN	OTHER ACT INCOME	\$160.00
STEITZER MATTHEW	OFFICIAL/JUDGE	\$55.00
SULLIVAN BRENDAN	OFFICIAL/JUDGE	\$80.00
SUN PRAIRIE HIGH SCHOOL	DUES AND FEES	\$80.00
THOMA DAVID	OFFICIAL/JUDGE	\$170.00
TREASURER ST OF IA	STATE INCOME TAX WITHHOLDING	\$135.61
TRI-CITY ELECTRIC COMPANY OF IOWA	INSTRUCTIONAL SUPPLIES	\$674.75
UNI ATHLETICS- IOWA GIRLS HS MEET	DUES AND FEES	\$150.00
VAVRA STEVEN	INSTRUCTIONAL SUPPLIES	\$200.00
VINTON-SHELLSBURG COMM SCHOOL	DUES AND FEES	\$112.00
WAGNER STEVEN	OFFICIAL/JUDGE	\$55.00
WANGLER JONATHAN	OFFICIAL/JUDGE	\$120.00
WARTH MARK	OFFICIAL/JUDGE	\$246.00
WASHINGTON PATRONS OF PERFORMING ARTS	INSTRUCTIONAL SUPPLIES	\$300.00
WATERLOO COMMUNITY SCHOOL DIST	DUES AND FEES	\$225.00
WELTER KEN	OFFICIAL/JUDGE	\$100.00
WEST MUSIC CO	INSTRUCTIONAL SUPPLIES	\$748.42
WINDSTAR LINES	TRAVEL	\$2,054.11
WISE STEVE	OFFICIAL/JUDGE	\$205.00
WOOD LOREN	OFFICIAL/JUDGE	\$65.00
WORSTER STEVE	OFFICIAL/JUDGE	\$100.00
XAVIER HIGH SCHOOL	INSTRUCTIONAL SUPPLIES	\$200.00
YANECEK DOUG	OFFICIAL/JUDGE	\$55.00
YUSKA BILLY	OFFICIAL/JUDGE	\$84.60

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Vendor Name	Description	Check Total
		<b>Fund Total: \$46,869.17</b>
<b>Fund: STUDENT STORE</b>		
BMO MASTERCARD	GENERAL SUPPLIES	\$1,045.47
COLDESI, INC	GENERAL SUPPLIES	\$1,633.98
SCHEELS ALL SPORTS, INC	GENERAL SUPPLIES	\$864.00
		<b>Fund Total: \$3,543.45</b>
		<b>Grand Total: \$8,518,428.06</b>

End of Report