



Exhibit 501.1

# **Certified Budget Update**

*Fiscal Year 2026*

# Topics

1. *Purpose*
2. *Timeline*
3. *Key Factors*
4. *Preliminary Estimate*

# Certified Budget Process Update

1. *Establish a maximum tax rate*
2. *Communicate tax rate and levy amount expectations to the public*
3. *Inform FY26 line item budget process*

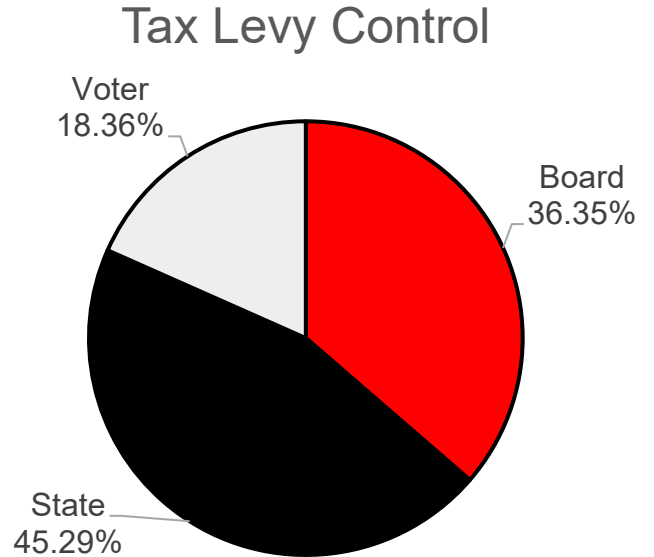
# Certified Budget Process Timeline

- March 5: Establish maximum tax rate and proposed budget; notify Linn County auditor.
- March 13: Publish first hearing date in The Gazette and on District Webpage and Social Media
- March 31: Hold first budget hearing
- April 5: Finalize property tax levies and proposed budget
- April 13: Publish notice and second hearing date in The Gazette and on District Webpage and Social Media
- April 28: Hold second verified budget hearing and board action on budget
- Before April 30: File with Iowa Department of Management and County Auditor



# Key Factors for FY25

FUND	AMOUNT	RATE
General	\$37,052,244	\$13.53135
Management	\$2,700,000	\$0.99082
Regular PPEL	\$940,438	\$0.33000
Voted PPEL	\$3,818,748	\$1.34000
PERL	\$367,875	\$0.13500
Debt Service	\$4,928,900	\$1.72955
<b>TOTAL</b>	<b>\$49,658,205</b>	<b>\$18.05672</b>



# Preliminary Estimate

NOTICE OF PUBLIC HEARING - PROPOSED PROPERTY TAX LEVY  
Proposed LINN-MAR Property Tax Levy Fiscal Year July 1, 2025 - June 30, 2026

Location of Public Hearing: Will not Populate until "Finalize Property Tax Hearing Mailing" is selected

Date of Public Hearing: Will not Populate until "Finalize Property Tax Hearing Mailing" is selected

Time of Public Hearing: Will not Populate until "Finalize Property Tax Hearing Mailing" is selected

Location of Notice on School Website: Will not Populate until "Finalize Property Tax Hearing Mailing" is selected

At the public hearing any resident or taxpayer may present oral or written objections to, or arguments in favor of the proposed tax levy. After the hearing of the proposed tax levy, the Board will publish notice and hold a hearing on the proposed budget.

		Current Year Final Property Tax Dollar Levy FY 2025	Budget Year Effective Property Tax Dollar Levy (No change in Property Tax Dollars Levied) FY 2026	Budget Year Proposed Property Tax Dollar Levy FY 2026
General Fund Levy	1	31,296,193	31,296,193	32,836,842
Instructional Support Levy	2	4,045,921	4,045,921	4,078,672
Management	3	2,491,212	2,491,212	2,689,976
Amana Library	4	0	0	0
Voted Physical Plant and Equipment	5	3,683,582	3,683,582	3,805,209
Regular Physical Plant and Equipment	6	907,151	907,151	937,104
Reorganization Equalization	7	0	0	0
Public Education/Recreation (Playground)	8	357,853	357,853	364,511
Debt Service	9	5,416,186	5,416,186	4,911,417
<b>Grand Total</b>	<b>10</b>	<b>48,198,098</b>	<b>48,198,098</b>	<b>49,625,731</b>

	Current Year Final Property Tax Rate FY 2025	Budget Year Effective Property Tax Rate (No change in Property Tax Dollars Levied) FY 2026	Budget Year Proposed Property Tax Rate FY 2026
<b>Grand Total Levy Rate</b>	17.99339	17.52568	18.05672

Property Tax Comparison	Current Year Property Taxes	Proposed Property Taxes	Percent Change
Residential property with an Actual/Assessed Value of \$100,000/\$110,000	834	942	12.95
Commercial property with an Actual/Assessed Value of \$300,000/\$330,000	3,680	4,210	14.40

Note: Actual/Assessed Valuation is multiplied by a Rollback Percentage to get to the Taxable Valuation to calculate Property Taxes. Residential and Commercial properties have the same Rollback Percentage at \$150,000 Actual/Assessed Valuation. The Proposed Property taxes assume a 10% increase in property values for the year as a comparison to the current year.





# Questions & Discussion



# District Honors & Highlights

## February 24, 2025

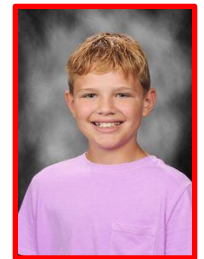


**Visual Arts Honor:** Congratulations to Emma Larson for being a recipient of *The Gazette's* Excellence in the Arts honor. Emma and the other recipients will be honored on March 9th at the Theatre Cedar Rapids.

[Click here for more details](#)

**Volunteer Highlight:** Thanks to Jerry Berns for the 15 years he has volunteered in support of the Linn-Mar Robotics program.

**Student Highlight:** Congratulations to Rowe, Boulder Peak 5th Grader, for being named the school and regional winner of the American Legion's *What the Flag Means to Me* essay contest.



**Academic Honor:** Congratulations to the 38 students who earned the Seal of Biliteracy recognition for demonstrating proficiency in two or more languages by the time of their graduation. [Click here for more details](#)

**Girls Wrestling Honors:** Kudos to the 27 ladies who participated in Girls Wrestling on a great season and congratulations to the 5 ladies that qualified for the State Tournament.





## Policy Recommendations – February 24, 2025

### **New Policy Recommendation:**

201.6-R Board President and Vice President Elections Regulation

### **800 Series-Business Procedures**

*Policies 801.4 and 802.9 and policies 803.6 thru 807.2 were reviewed with recommendations made for the following policies:*

- 801.4-General Fund Reserves and Fund Balance Reporting
- 802.9-Debt Management
- 802.9-R1-Regulations Regarding Debt Management (*Rescind*)
- 802.9-R2-Regulations Regarding Post Issuance Compliance
- 803.6-Approval and Payment for Goods and Services
- 803.8-Payroll Periods
- 803.9-Payroll Deductions
- 804.1-Financial Reports and Statements
- 804.2-Treasurer’s Annual Report (*Rescind*)
- 804.3-Audits
- 807.2-District Emergency Operations Plans

**Policy 201.6-R Board President and Vice President Elections Regulation  
(New Policy)**

The board shall elect the Board President and Vice President in a public meeting held in accordance with Iowa Code chapter 21, at the meetings set forth in Board Policies 202.3 and 202.4, or at any time when required due to a vacancy in either position. The following procedures shall be followed for the election of Board President and Vice President:

1. The President Pro Tem shall call for nominations for Board President for a one-year term to begin immediately following the conclusion of the election for Board President. Any board member may nominate themselves or any other current board member to serve as Board President.
2. Following nominations, the board member(s) so nominated must verbally indicate a willingness to serve in the position of Board President. The nominated board member may make a brief statement in support of their candidacy, not to exceed three minutes.
3. Other board members may make statements of support relating to any nominated board member(s), not to exceed three minutes per board member.
4. The President Pro Tem will then call for a motion to elect one of the nominated candidates to the position of Board President for a one-year term. Upon a motion and a second, the President Pro Tem will facilitate discussion of the motion. The President Pro Tem will then call for a roll call voice vote. The Board President may be elected by a simple majority of board members present who cast a vote.
5. If the motion fails for lack of a second or by roll call vote, the President Pro Tem will call for a new motion for Board President. This will continue until a Board President is elected by a majority vote.
6. If the motion passes, the newly elected Board President will assume the role of Board President, effective immediately.
7. The Board President will then follow steps 1-6 above to conduct the election for Board Vice President.
8. There is no limit on the number of consecutive terms that can be served by a board member serving as President or Vice President.

Policy 801.4 ~~General Fund Reserves and Fund Balance~~  
~~Reporting~~ **Governmental Accounting Practices and Regulations**

**GENERAL FUND BUDGET**

District accounting practices will follow state and federal laws and regulations, Generally Accepted Accounting Principles (GAAP), and the uniform financial accounting system provided by the Iowa Department of Education. As advised by the district's auditor, determination of liabilities and assets, prioritization of expenditures of governmental funds, and provisions for accounting disclosures shall be made in accordance with governmental accounting standards.

The district shall prepare an annual three-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 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). ~~Prior to setting 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.

\*Solvency Ratio Calculation:

$$\frac{\text{Unassigned + Assigned Fund Balances}}{\text{General Fund Revenues - AEA Flow Through}}$$

### **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**

In the Governmental Accounting Standards Board (GASB) Statement No. 54, the board identifies the order of spending unrestricted resources applying the highest level of classification of fund balance – restricted, committed, assigned, and unassigned – while honoring constraints on the specific purposes for which amounts in those fund balances can be spent. Formal board action is required to establish, modify, and/or rescind a committed fund balance. The resolution will state the exact dollar amount. In the event the board chooses to make changes or rescind the committed fund balance, formal board action is required.

The board authorizes the superintendent [or designee] to assign amounts to a specific purpose in compliance with GASB 54. An "assigned fund balance" should also be reported in the order of spending unrestricted resources but is not restricted or committed.

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 Types Definitions. Fund balance refers to the difference between assets and liabilities in the governmental funds

~~balance sheets. GASB Statement 54 established 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 these 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. Nonspendable Fund Balance: Includes amounts that cannot be spent because they are either not in spendable form, or 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 externally imposed by creditors, grantors, contributors, or laws or regulations of other governments; or imposed by law through constitutional provisions or enabling legislation. This includes “categorical balances.”
3. Committed Fund Balance: Reflects specific purposes 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 Statement 54.~~

It is the responsibility of the superintendent [or designee] to develop administrative regulations implementing this policy. It is also the responsibility of the superintendent [or designee] to make recommendations to the board regarding fund balance designations.

Adopted: 12/13  
Reviewed: 12/18  
Revised: 5/15; 1/22  
Legal Reference (Code of Iowa): §§ 257.31(4); 279.8; 297.22-25; 298A  
IASB Reference: 701.04

## Policy 802.9 Debt Management

### DEBT LIMITS

**Credit Ratings:** The district seeks to maintain the highest possible credit ratings for all categories of short- and long-term debt that can be achieved without compromising the delivery of services and the achievement of adopted objectives. The district recognizes that external economic, natural, or other events may, from time-to-time, affect the creditworthiness of its debt. Nevertheless, the district is committed to ensuring that actions within their control are prudent.

~~The board may conduct an election for the authority to issue bonded indebtedness. Revenues generated from an approved bond issue will be used only for the purpose stated on the ballot. Once the purpose on the ballot is completed, any balance remaining in a capital projects fund may be retained for future capital projects in accordance with the purpose stated on the ballot, or any remaining balance may be transferred by board resolution to the debt service fund or the Physical Plant and Equipment Levy (PPEL) fund. Voter approval is required to transfer monies to the general fund from the capital projects fund.~~

~~Revenues received from the issuing of bonded indebtedness will be deposited into the capital projects fund.~~

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

For revenue debt, the 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 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 USE OF DEBT

**Capital Planning:** To enhance creditworthiness and prudent financial management, the district is committed to systematic capital planning, intergovernmental cooperation, and coordination and long-term financial planning.

**Capital Financing:** The 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 district include:

- a. General Obligation Bonds;
- b. General Obligation Capital Loan Notes;
- c. Bond Anticipation Notes;
- d. Revenue Anticipation Notes;
- e. School Infrastructure Sales, Services, and Use Tax Revenue Bonds; and
- f. Lease Purchase Agreements, including Certificates of Participation.

**Working Capital Financing:** The 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 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.

**Refundings:** 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 district, such as to release restrictive bond covenants which affect the operations and management of the district.

In general, advance refundings for economic savings will be undertaken when a net present value savings exceeds three percent of the refunded debt can be achieved. Current refundings, which produce a new present value savings of less than three percent will be considered on a case by case basis taking into consideration bond covenants and general conditions. Refundings 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 law 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 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 district will only issue fixed-rate debt. In very limited circumstances, the 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 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 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 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 district is contemplating the issuance of debt, information will be developed concerning the following four categories commonly used by rating agencies assessing the district's credit worthiness, listed below.

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.

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 expenditures 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.

Governmental and Administrative Analysis: Government organization structure; location of financial responsibilities and degree of control; adequacy of basic service provision; intergovernmental cooperation/conflict and extent of duplication; and overall planning efforts.

Economic Analysis: Geographic and location advantages; population and demographic characteristics; wealth indicators; types of employment, industry, and occupation; housing characteristics; new construction; evidence 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 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 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 school district credit are unusually volatile or uncertain.

**Professional Service Providers:** The district will retain external bond counsel for all debt issues. All debt issued by the district will include a written opinion by bond counsel affirming that the district is authorized to issue the debt, stating that the 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 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 shall have the authority to periodically select other service providers (e.g., escrow agents, verification agents, trustees, arbitrage consultants, rebate specialists, 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 district shall invest all proceeds received from the issuance of debt separate from the 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 district's investment policy to maintain safety of principal and liquidity of the funds.

**Arbitrage and Recordkeeping Compliance:** The board treasurer shall maintain a system of recordkeeping, reporting, and compliance procedures with respect to all federal tax requirements which are currently, or may become applicable, through the lifetime of all tax-exempt or tax credit bonds.

Federal tax compliance, recordkeeping, reporting, and compliance procedures shall include, but not be limited to:

- a. Post-issuance compliance procedures (including proper use of proceeds, timely expenditure of proceeds, proper use of bond financed property, yield restriction and rebate, and timely return filing);
- b. Proper maintenance of records to support federal tax compliance;
- c. Investments and arbitrage compliance;
- d. Expenditures and assets;
- e. Private business use; and
- f. Designation of primary responsibilities for federal tax compliance of all bond financings.

**Financial Disclosure:** The 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 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, annual audits, and continuing disclosure statements will meet the standards articulated by the Municipal Securities Rulemaking Board (MSRB), the Government Accounting Standards Board (GASB), the Securities and Exchange Commission (SEC), Generally Accepted Accounting Principles (GAAP), and the Internal Revenue Service (IRS). The board treasurer shall be responsible for ongoing debt disclosure as required by any continuing disclosure certificate for any debt issue and to maintain compliance with disclosure standards promulgated by state and federal regulatory bodies.

Adopted: 6/99  
Reviewed: 7/10; 10/12; 5/15; 12/18; 1/22  
Revised: 12/13  
Related Policy: 801.4; 802.9-R1-R2  
Legal Reference (Code of Iowa): §§ 74-76; 278.1; 298; 298A  
IASB Reference: 704.02

# RESCIND POLICY – MERGED WITH LM POLICY 802.9

## Policy Series 800 – Business Procedures Income



### Policy 802.9-R1 Regulations Regarding Debt Management

#### GENERAL

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

For revenue debt, the 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 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 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 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 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 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 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 district, such as to release restrictive bond covenants which affect the operations and management of the 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 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 district will design the repayment of its overall debt to rapidly recapture its credit capacity for future use.

Generally, the district will only issue fixed-rate debt. In very limited circumstances, the 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 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 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 district is contemplating the issuance of debt, information will be developed concerning the following four categories commonly used by rating agencies assessing the district's credit worthiness, listed below:

- **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.
- **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.
- **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.
- **Economic Analysis:** Geographic and location advantages, population and demographic characteristics, wealth indicators, types of employment, industry and occupation, housing characteristics, new construction, evidence 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 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 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 district will retain external bond counsel for all debt issues. All debt issued by the district will include a written opinion by bond counsel affirming that the district is authorized to issue the debt and stating that the 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 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 district shall invest all proceeds received from the issuance of debt separate from the 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 district's investment policy to maintain safety of principal and liquidity of the funds.

**Arbitrage and Recordkeeping Compliance:** The district will maintain a system of recordkeeping, 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:

- a. 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);
- b. Proper maintenance of records to support federal tax compliance;
- c. Investments and arbitrage compliance;
- d. Expenditures and assets;
- e. Private business use; and
- f. Designation of primary responsibilities for federal tax compliance of all bond financings.

**Financial Disclosure:** The 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 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.

Adopted: 12/13

Reviewed: 5/15; 12/18

Revised: 1/22

Related Policy: 802.9; 802.9-R2; 804.1

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

IASB Reference: 704.02

**Policy 802.9-R2 R1 ~~Regulations Regarding Post-Issuance Compliance Debt Management~~ – Post-Issuance Compliance Regulation for Tax-Exempt Obligations**

**1. Role of Compliance Coordinator/Board Treasurer:**

The board treasurer shall:

- a. Be responsible for monitoring post-issuance compliance;
- b. Maintain a copy of the transcript of proceedings or minutes in connection with the issuance of any tax-exempt obligations and obtain records that are necessary to meet the requirements of this regulation;
- c. Consult with bond counsel, a rebate consultant, financial advisor, IRS publications, and such other resources as are necessary to understand and meet the requirements of this regulation; and
- d. Seek out training and education to be implemented upon the occurrence of new developments in the area and upon the hiring of new personnel to implement this regulation.

**2. Financing Transcripts Filing and Retention:** The board treasurer shall confirm the proper filing of an IRS 8038 Series return and maintain a transcript of proceedings and minutes for all tax-exempt obligations issued by the district including, but not limited to, all tax exempt bonds, notes, and lease-purchase contracts. Each transcript shall be maintained until 11 years after the tax-exempt obligation documents have been retired. The transcript shall include, at a minimum:

- a. Form 8038;
- b. Minutes, resolutions, and certificates;
- c. Certifications of issue price from the underwriter;
- d. Formal elections required by the IRS;
- e. Trustee statements;
- f. Records of refunded bonds, if applicable;
- g. Correspondence relating to bond financings; and
- h. Report of any IRS examinations for bond financings.

**3. Proper Use of Proceeds:** The board treasurer shall review the resolution authorizing issuance for each tax-exempt obligation issued by the district and the district shall:

- a. Obtain a computation of the yield on such issue from the district's financial advisor;
- b. Create a separate Project Fund (with as many sub-funds as shall be necessary to allocate proceeds among the projects being funded by the issue) into which the proceeds of issue shall be deposited;
- c. Review all requisitions, draw schedules, requests, invoices, and bills requesting payment from the Project Fund;



- d. Determine whether payment from the Project Fund is appropriate and, if so, make payment from the Project Fund (and appropriate sub-fund, if applicable);
- e. Maintain records of payment requests and corresponding records showing payment;
- f. Maintain records showing the earnings on, and investment of, the Project Fund;
- g. Ensure that all investments acquired with proceeds are purchased at fair market value;
- h. Identify bond proceeds or applicable debt service allocations that must be invested with a yield-restriction and monitor the investments of any yield-restricted funds to ensure that the yield on such investments do not exceed the yield to which such investments are restricted; and
- i. Maintain records related to any investment contracts, credit enhancement transactions, and the bidding of financial products related to the proceeds.

**4. Timely Expenditure and Arbitrage/Rebate Compliance:** The board treasurer shall review the tax exemption certificate (or equivalent) for each tax-exempt obligation issued by the district and the expenditure records provided in Section 2 of this regulation above and shall:

- a. Monitor and ensure that proceeds of each such issue are spent within the temporary period set forth in such certificate;
- b. Monitor and ensure that the proceeds are spent in accordance with one or more of the applicable exceptions to rebate as set forth in such certificate if the district does not meet the "small issuer" exception for said obligation;
- c. Not less than 60 days prior to a required expenditure date, confer with bond counsel and a rebate consultant if the district will fail to meet the applicable temporary period or rebate exception expenditure requirements of the tax exemption certificate. In the event the district fails to meet a temporary period or rebate exception:
  1. Procure a timely computation of any rebate liability and, if rebate is due, file a Form 8038-T and arrange for payment of such rebate liability; and
  2. Arrange for timely computation and payment of yield reduction payments (as such term is defined in the Code and Treasury Regulations), if applicable.

**5. Proper Use of Bond Financed Assets:** The board treasurer shall:

- a. Maintain appropriate records and a list of all bond financed assets. Such records shall include the actual amount of proceeds (including investment earnings) spent on each of the bond financed assets;
- b. Monitor and confer with bond counsel with respect to all proposed bond financed assets:
  - o Management contracts;
  - o Service agreements;
  - o Research contracts;
  - o Naming rights contracts;

- Leases or sub-leases;
  - Joint venture, limited liability or partnership arrangements;
  - Sale of property; or
  - Any other change in use of such asset.
- c. Maintain a copy of the proposed agreement, contract, lease, or arrangement together with the response by bond counsel with respect to said proposal for at least three years after retirement of all tax-exempt obligations issued to fund all or any portion of bond financed assets; and
- d. Contact bond counsel and ensure timely remedial action under IRS regulations Sections 1.141-12, in the event the district takes an action with respect to a bond financed asset, which causes the private business tests or private loan financing test to be met.

**6. General Project Records:** For each project financed with tax-exempt obligations, the board treasurer shall maintain, until three years after retirement of the tax-exempt obligations or obligations issued to refund those obligations, the following:

- a. Appraisals, demand surveys, or feasibility studies;
- b. Applications, approvals, and other documentation of grants;
- c. Depreciation schedules; and
- d. Contracts respecting the project.

**7. Advance Refundings:** The board treasurer shall be responsible for the following current, post issuance, and record retention procedures with respect to advance refunding bonds.

- a. Identify and select bonds to be advance refunded with advice from internal financial personnel and a financial advisor;
- b. Identify, with advice from the financial advisor and bond counsel, any possible federal tax compliance issues prior to structuring any advance refunding;
- c. Review the structure with the input of the financial advisor and bond counsel of advance refunding issues prior to the issuance to ensure:
  - 1. That the proposed refunding is permitted pursuant to applicable federal tax requirements if there has been a prior refunding of the original bond issue;
  - 2. That the proposed issuance complies with federal income tax requirements which might impose restrictions on the redemption date of the refunded bonds;
  - 3. That the proposed issuance complies with federal income tax requirements which allow for the proceeds and replacement proceeds of an issue to be invested temporarily in higher yielding investments without causing the advance refunding bonds to become "arbitrage bonds"; and
  - 4. That the proposed issuance will not result in the issuer's exploitation of the difference between tax-exempt and taxable interest rates to obtain a financial advantage nor overburden the tax-exempt market in a way that might be considered an abusive transaction for federal tax purposes.

- d. Collect and review data related to arbitrage yield restriction and rebate requirements for advance refunding bonds. To ensure such compliance, the board treasurer shall engage a rebate consultant to prepare a verification report in connection with the advance refunding issuance. Said report shall ensure said requirements are satisfied.
- e. Whenever possible, purchase State and Local Government Series (SLGS) to size each advance refunding escrow. The financial advisor shall be included in the process of subscribing SLGS. To the extent SLGS are not available for purchase, the board treasurer shall, in consultation with bond counsel and the financial advisor, comply with IRS regulations;
- f. Ensure, after input from bond counsel, compliance with any bidding requirements set forth by the IRS regulations to the extent as issuer elects to the purchase of a guaranteed investment contract;
- g. In determining the issue price for any advance refunding issuance, obtain and retain issue price certification by the purchasing underwriter at closing; and
- h. After the issuance of an advance refunding issue, ensure timely identification of violations of any federal tax requirements and engage bond counsel in attempt to remediate same in accordance with IRS regulations.

**8. Continuing Disclosure:** The board treasurer shall assure compliance with each continuing disclosure certificate and annually, per continuing disclosure agreements, file audited annual financial statements and other information required by each continuing disclosure agreement. The board treasurer will monitor material events as described in each continuing disclosure agreement and assure compliance with material event disclosure. Events to be reported shall be reported promptly, but in no event not later than 10 business days after the day of the occurrence of the event. Currently, such notice shall be given in the event of:

- a. Principal and interest payment delinquencies;
- b. Non-payment related defaults if material;
- c. Unscheduled draws on debt service reserves reflecting financial difficulties;
- d. Unscheduled draws on credit enhancements relating to the bonds reflecting financial difficulties;
- e. Substitution of credit or liquidity providers, or their failure to perform;
- f. Adverse tax opinions, the issuance by the IRS of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices, or determinations with respect to the tax-exempt status of the bonds or material events affecting the tax-exempt status of the bonds;
- g. Modifications to rights of Holders of the Bonds if material;
- h. Bond calls (excluding sinking fund mandatory redemptions), if material and tender offers;
- i. Defeasances of the bonds;
- j. Release, substitution, or sale of property securing repaying of the bonds, if material;

- k. Rating changes on the bonds;
- l. Bankruptcy, insolvency, receivership, or similar event of the issuer;
- m. The consummation of a merger, consolidation, or acquisition involving the issuer or the sale of all or substantially all of the assets of the issuer, other than in the ordinary course of business, the entry into a definitive agreement to undertake such action, or the termination of a definitive agreement relating to any such actions other than pursuant to its terms, if material; and
- n. Appointment of a successor or additional trustee or the change of name of a trustee, if material.

Adopted: 12/13  
Reviewed: 5/15; 12/18; 1/22  
Related Policy: 802.9; 802.9-R1  
IASB Reference: 704.02-R(1)

### Policy 803.6 ~~Approval and~~ Payment for Goods and Services

The board authorizes the issuance of ~~warrants and ACH transfer of funds for payment of~~ claims against the district for goods and services. The board will allow the ~~warrants~~ payment 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 authorizes the board secretary/treasurer, upon approval of the superintendent, to issue payments ~~for payment of reasonable and necessary expenses but only upon verified bills filed with the board secretary/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.~~ ~~for verified bills and for reasonable and necessary expenses when~~ the board is not in session. ~~The board secretary/treasurer will examine the claims and verify bills.~~ The board will approve the bills at its next regular meeting.

~~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 secretary/treasurer will determine to their satisfaction that the claims presented to the board are in order and are legitimate expenses of the district. It is the responsibility of the board secretary/treasurer to bring claims to the board.~~

The board president and board secretary/treasurer may sign warrants by use of a signature plate ~~or rubber stamp.~~ ~~If the board president is unavailable to personally sign warrants, the vice president may sign warrants on behalf of the president.~~

~~It is the responsibility of the superintendent [or designee] to develop the administrative regulations regarding this policy.~~

Adopted: 6/70  
Reviewed: 10/12; 5/15; 12/18  
Revised: 7/10; 12/13; 1/22  
Related Policy: 803.1; 803.2; 803.4; 803.7  
Legal Reference (Code of Iowa): §§ 279.8, .29, .30, .36; 291.12; 721.2(5); 281 IAC 12.3(1)  
IASB Reference: 705.03

### **Policy 803.8 Payroll Periods**

Unless otherwise established through collective bargaining, it is the policy of the board that all personnel of the district be paid monthly in accordance with the length of service stated on their contracts and that all personnel will be paid on the 20<sup>th</sup> day of each month, except when the 20<sup>th</sup> falls on a Saturday, Sunday, or a school holiday wherein checks will be issued on the preceding workday.

The board authorizes the superintendent [or designee] to grant pay advances for new hires in an amount not to exceed the amount they would have earned by the time they receive the advance. **The pay advance will be received on the next scheduled pay date.**

All new employees hired after July 1, 2008, as a condition of employment, will be required to have their wages paid to them as a direct deposit into a financial institution of their own choosing unless any of the following conditions exist:

1. The cost to the employee of establishing and maintaining an account for purposes of the direct deposit would effectively reduce the employee's wages to a level below the minimum wage provided under section 91D.1 of the Iowa Code;
2. The employee would incur fees charged to the employee's account as a result of the direct deposit; or
3. The provisions of a collective bargaining agreement mutually agreed upon by the district and the employee organization prohibits the district from requiring the employee to sign up for direct deposit as a condition of hire.

Adopted: 6/70  
Reviewed: 10/12; 12/13; 5/15; 12/18; 1/22  
Revised: 7/10  
Related Policy: 803.9  
Legal Reference (Code of Iowa): §§ 20; 91A  
IASB Reference: 706.01

### Policy 803.9 Payroll Deductions

~~The requirements stated in the master contract between employees in a certified collective bargaining unit and the board regarding payroll deductions of such employees will be followed.~~

Ease of administration is the primary consideration for payroll deductions, other than those required by law. Payroll deductions ~~for employees not covered by negotiated agreements will consist of~~ are made for federal income tax withholdings, Iowa income tax withholdings, federal insurance contributions, ~~social security, insurance premiums,~~ and the Iowa Public Employees Retirement System (IPERS). In addition, an employee may elect to have payments withheld for district-related and mutually agreed upon group insurance coverage and/or tax-sheltered annuity programs.

Written requests for the purchase of, or a change in, tax-sheltered annuities shall be on file in the payroll department 30 days prior to the desired effective date. Requests for reductions in gross wages for contributions to tax-sheltered annuities shall conform to the standards of the Internal Revenue Service (IRS) and all other governing and regulatory agencies in effect at the time of the request. Deductions for tax-sheltered annuities may be revoked 30 days after receiving a written request from the employee.

~~Requests for these deductions will be made in writing to the superintendent [or designee]. Other payroll deductions, similar to United Way or the Linn-Mar School Foundation, will be permitted after recommendation by administration and approval of the board. These employees may elect to have payments withheld for insurance and/or annuity programs provided such programs have been approved by the board.~~

The district may deduct wages as required or allowed by state or federal law or by order of the court of competent jurisdiction.

It is the responsibility of the superintendent [or designee] to determine which additional payroll deductions will be allowed.

Payroll deduction requirements stated in the employee handbook, if any, will be followed.

**Policy 804.1 Financial Reports and Statements**  
**Presentation and Publication of Financial Information**

The district recognizes the importance and value of fulfilling timely reporting requirements. Regularly providing updated financial information assists the board in making informed decisions for the future financial health of the district.

At the annual meeting, the board treasurer will give the annual report stating the amount held over, received, paid out, and on hand in the general and all other funds. This report is in written form and sent to the board with the agenda for the board meeting. The board treasurer will also furnish the board with a statement from each depository showing the balance then on deposit. It is the responsibility of the board treasurer to submit this report to the board annually.

~~On a monthly basis, the board secretary will file with the board a complete financial statement of the preceding month's business. Whenever possible, this statement will be enclosed with the board agenda sent to the members of the board in advance of the regular monthly meetings.~~ The board secretary will report to the board each month about the receipts, disbursements, and balances of the various funds. This report will be in written form and sent to the board with the agenda for the board meeting.

Following board approval, each month the schedule of bills allowed by the board is published in a newspaper designated as the newspaper for official publication. Annually, the total salaries paid to employees regularly employed by the district will also be published in a newspaper designated as the newspaper for official publication. It is the responsibility of the board secretary to publish these reports in a timely manner.

Adopted: 6/70

Reviewed: 10/12; 12/13; 5/15; 12/18; 1/22

Revised: 7/10

Legal Reference (Code of Iowa): §§ 279; 291.7; 618

IASB Reference: 707.01



# RESCIND – Combined with Policy 804.1

## Policy Series 800 – Business Procedures Reports



### Policy 804.2 Treasurer's Annual Report

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.

Adopted: 6/70  
Reviewed: 10/12; 12/13; 5/15; 12/18  
Revised: 4/09; 1/22  
Related Policy: 204.4  
Legal Reference (Code of Iowa): §§ 279.31, .33  
IASB Reference: 707.02

### Policy 804.3 Audits

In accordance with state law, to review the funds and accounts of the district, the board will employ an independent auditor ~~[or designee]~~ certified in the state of Iowa to perform an annual audit of the financial affairs of the district. The superintendent [or designee] will use a request for proposal procedure in selecting an auditor. The administration will cooperate with the auditors. Annual audit reports will be filed with the state auditor and remain on file as permanent records of the district.

To ensure an unbiased audit, if the same firm is conducting the annual audit, then the members of the audit team must be changed every other year. As the board selects and approves the auditors for the annual audits and considers the contract duration, consideration will be given to changing audit firms every six years.

Adopted: 6/70  
Reviewed: 10/12; 12/18; 1/22  
Revised: 7/10; 12/13; 5/15  
Legal Reference (Code of Iowa): §11.6  
IASB Reference: 707.04

## Policy 807.2 District Emergency Operations Plans

The safety and security of the school community is paramount to the Linn-Mar Community School District. While there is no absolute guarantee of safety, it is the goal of the district to encourage and support a physically secure learning and working environment within its buildings. The district ~~will~~ shall work in conjunction with community stakeholders including local emergency management coordinators and local law enforcement agencies to create emergency operations plans for all district buildings and school buildings where students are educated.

The superintendent [or designee] ~~is~~ shall be responsible for the development, review, and implementation of the district emergency operations plans. The plan ~~will~~ shall include procedures for transmitting alerts regarding emergency situations to students, school personnel, and employers for non-school employees whose presence is regularly required in the school buildings. The district emergency operations plans ~~will~~ shall be updated and reviewed annually by the board and ~~will~~ shall address responses to natural disasters, active shooter scenarios, and other emergencies as determined by the district. The district emergency operations plans are confidential, and ~~will~~ shall not be subject to disclosure under Iowa Code Chapter 22. However, the district ~~will~~ shall publish procedures for students, parents and family members, and school personnel to report possible safety threats on school grounds and at school activities.

The administration ~~will~~ shall hold annual emergency operations drills at each district building covered by an emergency operations plan in accordance with law. The district ~~will~~ shall determine which school personnel ~~will~~ shall participate and whether local law enforcement and students will participate in the annual drills.

Adopted: 9/19  
Reviewed: 1/22  
Related Policy: 504.7; 504.10; 701.11; 807.1; 902.12  
Legal Reference (Code of Iowa): 280.30  
IASB Reference: 804.02

February 19, 2025

Andy Parke  
Building and Grounds Manager  
Linn-Mar Community School District  
3556 Winslow Road  
Marion, IA 52302

RE: Linn-Mar Excelsior Middle School Roof Improvements  
Linn-Mar Community School District

Dear Mr. Parke:

Ten bids were received on February 18, 2025, for the above referenced project.

We have reviewed the bids provided to us. Our review did discover the following irregularities:

- The bid submitted by Service Roofing Company did not include the Authorization to Transact Business Form.
- The bid submitted by Jim Giese Commercial Roofing, Inc. contained calculation errors.
- The bid submitted by Giese Roofing Company contained calculation errors.

Since none of the above irregularities supplanted the low bid submitted by Dryspace, Inc., we recommend that the Linn-Mar Community School District proceed with your award process on Base Bid 1 and Alternate Bid 1 to Dryspace, Inc. This award may be subject to submittal of acceptable bonds, insurance, and other requirements of the Linn-Mar Community School District. We are enclosing a copy of the bid tabulation for your use.

**Dryspace, Inc.**

Base Bid 1 – Excelsior Roof Sec A Roof Replacement	\$336,760.00
Alternate Bid 1 – Excelsior Roof Section B Removal & Replacement	<u>\$ 30,967.00</u>
	<b>TOTAL \$367,727.00</b>

The Unit Price for the Roof Decking, identified in the Base Bid 1 will be performed at \$20.00 per square foot. It was noted that unit price quantities are not guaranteed. Final payment will be based on actual quantities.

Please contact our office of the award decision and we will proceed with obtaining the agreement, bonds and insurance.

We look forward to working with you and Linn-Mar Community School District on this project. Please call our office if you have any questions or comments regarding the above project.

Sincerely,



Stephen Stewart, Roofing Consultant  
SHIVE-HATTERY, INC.

Enclosure: Bid Tabulation

Copy: Jon Galbrath, Linn-Mar CSD  
Lisa Goeman, S-H



TABULATION OF BIDS

Owner: **Linn-Mar Community School District**

2/18/2025

Project Name: **Excelsior Middle School Roof Improvements**

Linn-Mar Community School District

S-H Project #: **2240014660**

3556 Winslow Road  
Marion, IA 52302  
1 of 1

ADDRESS OF BIDDER		Dryspace, Inc. 707 66th Avenue SW Cedar Rapids, IA 52404	T & K Roofing Company 101 T & K Drive Ely, IA 52227	ForSure Roofing & Sheet Metal, LLC 6545 NE 14th Street Des Moines, IA 50313	Black Hawk Roof Company, Inc. 2843 Geraldine Road Waterloo, IA 50703	Advance Builders Corp. 325 Waconia Ct SW Cedar Rapids, IA 52404	R3 Commercial Roofing 112 W. 3rd Street Davenport, IA 52801	Cedar Service 714 66th Avenue SW Cedar Rapids, IA	Service Roofing 123 Arizona Street Waterloo, IA 50703	Jim Giese Commercial Roofing, Inc. 4 Lincoln Avenue Eldridge, IA 52748	Giese Roofing Company 2820 Elm Street Dubuque, IA 52001											
Bid Security - 5%		X	X	X	X	X	X	X	X	X	X											
Bidder Status Form 00 4100.01		X	X	X	X	X	X	X	X	X	X											
Authorization to Transact Business Worksheet 00 4100.02		X	X	X	X	X	X	X	X	X	X											
Non-Collusion Affidavit 00 4100.03		X	X	X	X	X	X	X	X	X	X											
Targeted Small Business Forms 00 4100.04		X	X	X	X	X	X	X	X	X	X											
ITEM	DESCRIPTION	QUANTITY	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED	UNIT PRICE	EXTENDED
1	BASE BID 1 - EXCELSIOR ROOF SEC A - ROOF REPLACEMENT	LUMP SUM																				
			LUMP SUM \$	334,760.00	LUMP SUM \$	340,400.00	LUMP SUM \$	343,759.00	LUMP SUM \$	355,900.00	LUMP SUM \$	352,000.00	LUMP SUM \$	369,500.00	LUMP SUM \$	395,768.00	LUMP SUM \$	426,725.00	LUMP SUM \$	430,500.00	LUMP SUM \$	464,770.00
2	ROOF DECKING	100																				
			\$20.00	\$ 2,000.00	\$12.00	\$ 1,200.00	\$9.50	\$ 950.00	\$12.00	\$ 1,200.00	\$5.00	\$ 500.00	\$45.00	\$ 4,500.00	\$17.00	\$ 1,700.00	\$15.00	\$ 1,500.00	\$15.00	\$ 1,500.00	\$10.00	\$ 1,000.00
	TOTAL BASE BID 1		\$	336,760.00	\$	341,600.00	\$	344,709.00	\$	357,100.00	\$	352,500.00	\$	374,000.00	\$	397,468.00	\$	428,225.00	\$	432,000.00	\$	465,770.00
ALTERNATE BID 1 - EXCELSIOR ROOF SECTION B																						
1	ALTERNATE BID 1 - EXCELSIOR ROOF SEC B - REMOVAL AND REPLACEMENT	LUMP SUM																				
			LUMP SUM \$	30,967.00	LUMP SUM \$	32,000.00	LUMP SUM \$	29,932.00	LUMP SUM \$	28,444.00	LUMP SUM \$	36,000.00	LUMP SUM \$	17,500.00	LUMP SUM \$	29,846.00	LUMP SUM \$	24,250.00	LUMP SUM \$	38,200.00	LUMP SUM \$	28,990.00
	TOTAL ALTERNATE BID 1		\$	30,967.00	\$	32,000.00	\$	29,932.00	\$	28,444.00	\$	36,000.00	\$	17,500.00	\$	29,846.00	\$	24,250.00	\$	38,200.00	\$	28,990.00
	TOTAL ALL BIDS		\$	367,727.00	\$	373,600.00	\$	374,641.00	\$	385,544.00	\$	388,500.00	\$	391,500.00	\$	427,314.00	\$	452,475.00	\$	470,200.00	\$	494,760.00

\*Jim Giese Commerical Roofing & Giese Roofing Company bids contained calculation errors





**INSPIRE LEARNING.  
UNLOCK POTENTIAL.  
EMPOWER ACHIEVEMENT.**

## **BOARD OF DIRECTORS MINUTES FEBRUARY 10, 2025**

[Click here for livestream recording](#)

### **100: CALL TO ORDER & DETERMINATION OF A QUORUM**

The meeting of the Linn-Mar Board of Directors was called to order at 5:00 PM in the boardroom of the district administration building (3556 Winslow Rd, Marion). Roll was taken to determine a quorum. Present: Buchholz, Foss, Mansoor, Morey, Thomas, Walker, and Lowe Lancaster. Administration present: Kortemeyer, Galbraith, Frick, Nelson, Ramos, and Wear. Absent: Christian.

### **200: ADOPTION OF AGENDA – Motion 98-02-10**

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

### **300: AUDIENCE COMMUNICATIONS** *(SPG #1-Community Engagement)*

1. Vanessa Renaud-Resident-support for immigration resolution
2. Iris Strong-Resident-support for immigration resolution
3. Briana Clymer-graduate-support for immigration resolution
4. Ana Clymer-Parent-support for immigration resolution

### **400: MISSION MOMENT** *(SPG #1-Community Engagement / BG #2.e-Student Learning)*

The Board of Directors highlighted the Metropolitan Orchestra Festival, the athletic Hall of Fame Induction, and the district's strong academic rigor.

### **500: INFORMATIONAL REPORTS**

#### **501: LM Building Naming Committee Report – Exhibit 501.1**

*(SPG #1-Community Engagement)*

Kiya Hinkel and Mehal Raghvani, student members of the LM Building Naming Committee, presented information on the process and suggested names for the former LRC building and the new administration building. Names suggested for the new administration building were Creekside Administrative Building, Ridgeview Administrative Center, and Educational Leadership Center. The name suggested for the former Learning Resource Center was Academic Excellence Center.

#### **502: FY24 Auditor's Report – Exhibit 502.1**

*(SPG #5 Resource Management / BG #3.c-District Culture)*

Mia Frommelt, from Bohnsack & Frommelt, reviewed the 2024 fiscal year audit findings including information on the audits completed and deliverables and that there were no compliance findings.

**503: Upbeat Survey Report** (SPG #4-People & Culture / BG #3.a-District Culture) – **Exhibit 503.1**

Amy Kortemeyer, Superintendent, reported on the recent Upbeat staff survey including information on participation rates, satisfaction and purpose percentages, retention information, areas of strengths and opportunity, critical feedback and themes, and next steps.

**504: Policy Committee Report** (BG #1.c-Visionary Team)

Director Thomas reported that during the February 3<sup>rd</sup> Policy Committee meeting the second half of the 800 policy series, several IASB recommendations, and policies on artificial intelligence were reviewed.

**505: Linn County Conference Board Report**

(SPG #1-Community Engagement / BG #3.d-District Culture)

Director Buchholz reported that the February 6<sup>th</sup> Linn County Conference Board meeting was postponed until February 14<sup>th</sup> due to weather.

**506: Marion City Council Report** (SPG #1-Community Engagement / BG #3.d-District Culture)

Director Mansoor reported that during the February 6<sup>th</sup> Marion City Council meeting there was discussion on installing a rapid flashing beacon at the intersections of 35<sup>th</sup> Street and 35<sup>th</sup> Avenue in Marion and at the intersection of East Robins Road and Mulberry Drive in Robins and also the installation of turning lanes at the intersection of Hwy 13 and Prairie Ridge Avenue. The Council also approved the rezoning of land located northeast of Lowe Park from agricultural to single-family residential.

**507: Legislative Report & IASB Day on the Hill Event**

(BG # 1.b-c-Visionary Team & 3.d-District Culture)

Directors Foss reported on the educational bills still under consideration in the legislative session and shared highlights of the Iowa Association of School Boards' Day on the Hill event that included a presentation by the Venture Academic students.

**508: Superintendent's Report – Exhibit 508.1** (SPG #1-Community Engagement)

Superintendent Kortemeyer shared several district honors and highlights, reported on current construction projects, shared an update on the *Roar Like a Lion* registration campaign, reported on the request for proposal for the proposed preschool WRAP care program, and shared reminders of upcoming district events.

**600: UNFINISHED BUSINESS**

**601: Facility Naming Request – Exhibit 601.1 – Motion 99-02-10**

(SPG #1-Community Engagement)

**MOTION** by Buchholz to approve the request submitted by the Linn-Mar Booster Club to rename the concession stand at the Ball Complex as the *Pete King Concession Stand* after the late Pete King. Second by Morey. Voice vote, all ayes. Motion carried.

**700: NEW BUSINESS** (SPG #5-Resource Management / BG #1.c-Visionary Team & #3.c-District Culture)

**701: Approval of LM Building Names – Refer to Exhibit 501.1 – Motion 100-02-10**

President Lowe Lancaster facilitated a discussion on the proposed names submitted by the LM Building Naming Committee which were:

- Former Learning Resource Center (LRC): Academic Excellence Center
- New Administration Building:
  - Creekside Administrative Building
  - Ridgeview Administrative Center
  - Educational Leadership Center

**MOTION** by Buchholz to approve the name change of *Academic Excellence Center* for the former LRC building and the name of *Educational Leadership Center* for the new administration building. Second by Mansoor. Voice vote, all ayes. Motion carried.

**702: Approval of Open Enrollment Requests – Motion 101-02-10**

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

Approved IN	Student Name	Grade	Resident District
	Backout, B'Licknu	3	Cedar Rapids CSD

Approved OUT	Student Name	Grade	Requested District
	Roberts, Kayel	10	College CSD

**800: CONSENT AGENDA – Motion 102-02-10**

**MOTION** by Walker to approve the consent agenda as presented. Second by Thomas. Congratulations were shared with Lisa Peterson on her retirement. Voice vote, all ayes. Motion carried. (SPG #4-People/Culture & #5-Resource Mngmt / BG #3.a, c, d-District Culture)

**801: Personnel**

**Certified Staff: Resignations**

Name	Assignment	Dept Action	Reason
Hanson, Kristin	LMHS: Student Support Services Teacher	6/5/25	Relocation
Peterson, Lisa	LMHS: Compass/Atlas Teacher	5/30/25	Retirement
Sullivan, Lauren	WF: 4 <sup>th</sup> Grade Teacher	2/28/25	Relocation

**Classified Staff: Assignments/Reassignments/Transfers**

Name	Assignment	Dept Action	Salary Placement
Cleppe, Kathie	NS: BW General Help from 3.25 to 4/hrs day	1/6/25	Same
Contreras, Brittany	District: Student Services Admin Assistant	2/17/25	\$20.50/hour
Gehrls, Lenora	LMHS: Student Support Associate	2/6/25	LMSEAA A, Step 1
Gorman, Christopher	BW: Student Support Associate	2/3/25	LMSEAA A, Step 1
Kauffman, Sheila	NS: From HP General Help/Cashier to WF General Help	2/3/25	PTNS, Step 1
Leason, Julie	NS: BW General Help from 3.5 to 4/hrs day	1/6/25	Same
Limkemann, Maggie	NS: LMHS General Help	1/27/25	PTNS, Step 1
Vickery, Karen	BW: Student Support Associate	2/5/25	LMSEAA A, Step 1
West, Anna	LMHS: Student Support Associate	1/28/25	LMSEAA A, Step 1



**Classified Staff: Resignations**

Name	Assignment	Dept Action	Reason
Berry, John	BW: Student Support Associate	1/22/25	Termination
Brandt, Lauren	EH: Student Support Associate	2/12/25	Other Employment
Cassady, Brecken	LMHS: Student Support Associate	2/4/25	Personal
Ferencak, Fae	EH: Student Support Associate	2/11/25	Other Employment
Lentner, Candy	NE: Health Assistant	2/20/25	Other Employment
Wittenburg, Megan	LMHS: Student Support Associate	1/31/25	Personal

**Co/Extra-Curricular Staff: Assignments/Reassignments/Transfers**

Name	Assignment	Dept Action	Salary Placement
Chapa, Martin	LMHS: Assistant Boys Soccer Coach	3/17/25	\$2,000
Hill, Austin	LMHS: Assistant Boys Track Coach	2/24/25	\$500
Thomson, Jaxon	LMHS: Assistant Boys Track Coach	2/24/25	\$500
Tovey, Reed	LMHS: Assistant Boys Soccer Coach	3/17/25	\$2,000

**Co/Extra-Curricular Staff: Resignation**

Name	Assignment	Dept Action	Reason
Green, Justin	OR: Assistant 7 <sup>th</sup> Gr Football Coach	2/4/25	Personal

**802: Approval of January 27<sup>th</sup> Board Minutes – Exhibit 802.1****803: Approval of Bills/Warrants – Exhibit 803.1****804: Approval of Contracts/Agreements – Exhibits 804.1-4**

1. Epic Event Center rental agreement for LMHS Java & Jazz event
2. McComas-Lacina Construction change order #5 for new performance arts center
3. Jennifer Loeb independent contractor agreement for presentation to Venture Academics students
4. Iowa Public Information Board informal resolution
5. Inter-agency agreement for Special Education instructional services with Lisbon CSD (1). *For student confidentiality, exhibits are not provided.*

**805: Fundraising Request – Exhibits 805.1-2**

1. LMHS Softball to host a summer youth camp to raise funds for new equipment and additional coaches.
2. LMHS Key Club to sell Valentine candygrams to raise funds to support further initiatives and support other positive events.

**900: BOARD CALENDAR/COMMUNICATIONS/COMMITTEES****901: Board Calendar**

Date	Time	Event	Location
February 13	8:30 AM	Board Visit	Westfield Elementary
February 14	Noon	Linn County Conference Board ( <i>Buchholz</i> )	City of CR Admin Bldg
February 20	8:30 AM	Finance/Audit Committee (F/AC)	Boardroom
February 20	5:30 PM	Marion City Council ( <i>Thomas</i> )	City Hall
February 24	5:00 PM	LMCSD Board of Directors Meeting & Work Session	Boardroom
<i>February 25</i>	--	<i>2-Hour Early Dismissal (Grades JrK-12)</i>	<i>Elem/Int/MS Conferences</i>

February 26	4:15 PM	Career & Technical Education Advisory (CTE)	LMHS Room E-130
<i>February 27</i>	--	<i>2-Hour Early Dismissal (Grades JrK-12)</i>	<i>Elem/Int/MS Conferences</i>
<i>February 28</i>	--	<i>No School - Professional Day</i>	--
<b>Date</b>	<b>Time</b>	<b>Event</b>	<b>Location</b>
March 6	8:30 AM	Board Visit	Novak Elementary
March 6	Noon	Linn County Conference Board ( <i>Buchholz</i> )	City of CR Admin Bldg
March 6	5:30 PM	Marion City Council ( <i>Mansoor</i> )	City Hall
<i>March 8</i>	<i>6:00 PM</i>	<i>LM School Foundation MANE Event</i>	<i>DoubleTree by Hilton</i>
<i>March 11</i>	<i>11:30 AM</i>	<i>Marion State of the City</i>	<i>DoubleTree by Hilton</i>
March 12	4:00 PM	LMHS School Counselors Advisory	LMHS College/Career Cntr
March 13	8:30 AM	Finance/Audit Committee (F/AC)	Boardroom
<i>March 17-21</i>	--	<i>Spring Break</i>	--
March 20	5:30 PM	Marion City Council ( <i>Lowe Lancaster</i> )	City Hall
<i>March 26</i>	<i>6:00 PM</i>	<i>Lion Learning Session</i>	<i>Boardroom</i>
<i>March 28</i>	--	<i>End of Third Quarter</i>	--
<i>March 31</i>	--	<i>No School – Professional Day</i>	--
March 31	5:00 PM	LMCSD Board of Directors Meeting & Special Session	Boardroom

**902: Board Communications**

President Lowe Lancaster re-announced the results of the written tally conducted during the board president election on November 11, 2024, stating, “*The floor was opened for nominations. Director Morey nominated Katie Lowe Lancaster and Director Foss nominated Barry Buchholz. An informal tally was taken with Director Lowe Lancaster receiving 4 votes from Directors Mansoor, Morey, Thomas, and Lowe Lancaster. Director Buchholz received 3 votes from Directors Foss, Walker, and Buchholz. A motion was then made by Director Buchholz to elect Katie Lowe Lancaster to serve a one-year term as board president. The motion was seconded by Director Walker. A roll call vote resulted in all ayes and the motion carried.*”

**903: Board Committees/Advisories**

**Required Board Committees/Advisories**

<b>Committee/Advisory</b>	<b>Board Representatives</b>
Finance/Audit Committee (F/AC)	Buchholz, Foss, Morey
Policy Committee (PC)	Lowe Lancaster, Thomas, Walker
Career & Technical Education Advisory (CTE)	Mansoor, Morey, Thomas
School Improvement Advisory Committee (SIAC)	Lowe Lancaster, Mansoor, Morey

**Additional District Committees/Advisories**

<b>Committee/Advisory</b>	<b>Board Representatives</b>
Diversity/Equity/Inclusion Committee (DEI)	Lowe Lancaster, Thomas
Facilities Advisory Committee	Foss, Mansoor, Morey
Venture Academics Advisory (VAA)	Morey, Walker
LMHS School Counselors Advisory	Mansoor, Walker
MEDCO Community Promise Advisory	Buchholz
Linn County Conference Board	Buchholz
Legislative Liaisons	Foss, Thomas

\*SPG = Strategic Plan Goal/ BG = Board Goal

**1000: ADJOURNMENT** – **Motion 103-02-10**

**MOTION** by Buchholz to adjourn the meeting at 6:17 PM. Second by Walker. Voice vote, all ayes. Motion carried.

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Katie Lowe Lancaster, Board President

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Jonathan Galbraith, Board Secretary/Treasurer

**BOARD OF DIRECTORS  
WORK SESSION MINUTES  
FEBRUARY 10, 2025**

**100: CALL TO ORDER & DETERMINATION OF A QUORUM**

The work session of the Linn-Mar Board of Directors was called to order at 6:30 PM in the boardroom of the district administration building (3556 Winslow Road, Marion). Roll was taken to determine a quorum. Present: Buchholz, Foss, Mansoor, Morey, Thomas, Walker, and Lowe Lancaster. Administration present: Kortemeyer, Galbraith, Frick, Nelson, Ramos, and Wear. Absent: Christian.

**200: ADOPTION OF AGENDA – *Motion 104-02-10***

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

**300: WORK SESSION**

**301: Discussion on the Proposed Indoor Activities Center**

Jon Galbraith, LMCSO Chief Financial/Operating Officer, Vicki Hyland and Susan Bowersox, OPN Architects, and Matt Gillaspie, Managing Director with Piper Sandler, Tonya Moe, Athletics Director, and Chris Fechner, Associate Athletic Director, facilitated a review of the proposed LMHS indoor activities center project and financing options.

**400: ADJOURNMENT – *Motion 105-02-10***

**MOTION** by Buchholz to adjourn the meeting at 8:21 PM. Second by Morey. Voice vote, all ayes. Motion carried.

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Katie Lowe Lancaster, Board President

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Jonathan Galbraith, Board Secretary/Treasurer

## Linn-Mar Community School District

## IA- Warrants Paid Listing

Criteria

Date Range: 02/06/2025 - 02/19/2025

Fiscal Year: 2024-2025

Vendor Name	Description	Check Total
<b>Fund: AQUATIC CENTER</b>		
DUBUQUE AREA SWIMMIN' HURRICANES	DUES AND FEES	\$2,541.00
IOWA SWIMMING INC	DUES AND FEES	\$200.00
YMCA OF GREATER DES MOINES	DUES AND FEES	\$2,180.00
		<b>Fund Total: \$4,921.00</b>
<b>Fund: GENERAL</b>		
AGVANTAGE FS	GREASE,OIL,LUBE,COOL	\$743.03
AGVANTAGE FS	PROPANE	\$8,035.67
AHLERS AND COONEY, P.C.	OTHER PROFESSIONAL SERVICES	\$283.50
AIRGAS NORTH CENTRAL	INSTRUCTIONAL SUPPLIES	\$117.79
ALLIANT ENERGY	ELECTRICITY	\$271.51
ALTORFER	RENTALS EQUIPMENT	\$487.00
ANAMOSA COMMUNITY SCHOOLS	TUITION OPEN ENROLL	\$8,764.91
ARNOLD MOTOR SUPPLY	REPAIR PARTS	\$89.50
AT & T MOBILTY	TELEPHONE	\$1,153.33
ATLANTIC COCA-COLA	GENERAL SUPPLIES	\$412.18
AUTO-JET MUFFLER	TRANSP. PARTS	\$823.37
BENTON COMMUNITY SCHOOL DISTRICT	TUITION OPEN ENROLL	\$11,279.48
BLUUM OF MINNESOTA, LLC	EQUIPMENT >\$5,000	\$59,620.41
BRECKE	REPAIR/MAINT SERVICE	\$491.80
BUDGET CAR RENTAL	RENTALS EQUIPMENT	\$54.98
CAM COMMUNITY SCHOOL DISTRICT	TUITION OPEN ENROLL	\$195.65
CAPITAL SANITARY	MAINTENANCE SUPPLIES	\$12,930.68
CARRICO AQUATIC RESOURCES, INC	MAINTENANCE SUPPLIES	\$3,533.60
CEDAR RAPIDS COMM SCH DIST	TUITION OPEN ENROLL	\$1,839.89
CEDAR RAPIDS WATER DEPT	WATER/SEWER	\$1,163.14
CENTURYLINK	TELEPHONE	\$43.48
CERWICK BRENDA	Professional Educational Services	\$324.00
CHMILL ADRIENNE	STAFF TRAVEL	\$7.00
CITY LAUNDERING COMPANY	GENERAL SUPPLIES	\$182.80
CITY OF MARION.	OTHER PROFESSIONAL SERVICES	\$2,050.20
COLLEGE COMMUNITY SCHOOLS	TUITION OPEN ENROLL	\$46,798.64
CR/LC SOLID WASTE AGENCY	GROUNDS UPKEEP	\$97.60
CRESCENT PARTS & EQUIPMENT CO., INC	MAINTENANCE SUPPLIES	\$1,094.12
CROWBAR'S	GENERAL SUPPLIES	\$29.98
CULLIGAN	GENERAL SUPPLIES	\$505.59
CUMMINS SALES AND SERVICE	VEHICLE REPAIR	\$803.54
D & K PRODUCTS	GROUNDS UPKEEP	\$536.55
D'CAMP SARAH	STAFF TRAVEL	\$64.00
DAKTRONICS, INC	GENERAL SUPPLIES	\$1,090.00
ELECTRICAL ENGINEERING & EQUIPMENT CO.	ELECTRICAL SUPPLY	\$1,875.10
EMPLOYEE RESOURCE SYSTEMS, INC	OTHER PROFESSIONAL SERVICES	\$1,995.12
EMSLRC	INSTRUCTIONAL SUPPLIES	\$153.00
F & B CAB CO., INC	TRANSP PRIVATE CONT	\$385.00
FOLLETT CONTENT SOLUTIONS, LLC	Foundation EEEG - Instructional Supplies	\$90.84

# Linn-Mar Community School District

## IA- Warrants Paid Listing

Criteria

Date Range: 02/06/2025 - 02/19/2025

Fiscal Year: 2024-2025

Vendor Name	Description	Check Total
FOLLETT CONTENT SOLUTIONS, LLC	LIBRARY BOOKS	\$286.46
FREIBURGER VICKI	STAFF TRAVEL	\$28.75
FUTURE LINE	GROUNDS UPKEEP	\$2,009.60
GASWAY CO, J P	GENERAL SUPPLIES	\$1,580.22
GAZETTE COMMUNICATIONS INC	ADVERTISING	\$16.46
GOODWILL OF THE HEARTLAND	PROF SERV: EDUCATION	\$2,204.04
GRAINGER	GENERAL SUPPLIES	\$797.85
GREENWOOD CLEANING SYSTEMS	MAINTENANCE SUPPLIES	\$747.17
HASS GARCIA ANNA	STAFF TRAVEL	\$77.00
HAVEL NATALEE	STAFF TRAVEL	\$13.40
HAWKEYE FIRE & SAFETY COMPANY	OTHER PROFESSIONAL SERVICES	\$2,613.50
HICKS JESSIE	STAFF TRAVEL	\$16.00
HOTSY CLEANING SYSTEMS	GENERAL SUPPLIES	\$452.40
HUPP ELECTRIC MOTORS	HEAT/PLUMBING SUPPLY	\$793.13
HY-VEE FOOD STORE-8556	INSTRUCTIONAL SUPPLIES	\$44.34
IASB	DUES AND FEES	\$315.00
INTERSTATE BILLING SERVICE	GENERAL SUPPLIES	\$506.44
IOWA DEPT OF HUMAN SERVICES	MEDICAID REIMBURSE	\$61,599.12
IOWA PRISON INDUSTRIES	GENERAL SUPPLIES	\$1,008.48
ISFIS	DUES AND FEES	\$300.00
ISFIS	OTHER PROFESSIONAL SERVICES	\$664.50
JENNIFER LOEB	PROF SERV: EDUCATION	\$300.00
JOHNSTONE SUPPLY	HEAT/PLUMBING SUPPLY	\$26.16
KENNEDY HIGH SCHOOL	DUES AND FEES	\$330.00
KIRKWOOD COMM COLLEGE	TUITION-COMM COLLEGE	\$2,861.20
KIRKWOOD COMM COLLEGE	WELLNESS OTHER PROFESSIONAL SERVICES	\$337.00
KONE INC	REPAIR/MAINT SERVICE	\$14,218.56
KORTEMAYER AMY	STAFF TRAVEL	\$141.00
LAWSON PRODUCTS, INC	MAINTENANCE SUPPLIES	\$120.69
LAWSON PRODUCTS, INC	TRANSP. PARTS	\$157.20
LINDER TIRE SERVICE INC	TIRES AND TUBES	\$37.25
LINN COUNTY REC	ELECTRICITY	\$41,879.17
LINN COUNTY TREASURER-	TAXES AND ASSESSMENT	\$2,525.00
LYNCH FORD	VEHICLE REPAIR	\$287.57
MARION CHAMBER OF COMMERCE	DUES AND FEES	\$600.00
MAYES JACOB	STAFF TRAVEL	\$109.40
MCMASTER-CARR	GENERAL SUPPLIES	\$55.18
MCMASTER-CARR	INSTRUCTIONAL SUPPLIES	\$159.16
MENARDS -13127	GENERAL SUPPLIES	\$147.38
MENARDS -13127	INSTRUCTIONAL SUPPLIES	\$74.54
MID AMERICAN ENERGY	NATURAL GAS	\$286.76
MID-AMERICAN RESEARCH CHEMICAL	GENERAL SUPPLIES	\$134.15
MIDWEST ALARM SERVICES	ELECTRICAL SUPPLY	\$211.03
MIDWEST WHEEL	TRANSP. PARTS	\$381.88
MONTICELLO COMMUNITY SCHOOLS	TUITION OPEN ENROLL	\$4,181.26

# Linn-Mar Community School District

## IA- Warrants Paid Listing

Criteria

Date Range: 02/06/2025 - 02/19/2025

Fiscal Year: 2024-2025

Vendor Name	Description	Check Total
MPS	INSTRUCTIONAL SUPPLIES	\$429.91
MT VERNON CSD	TUITION OPEN ENROLL	\$144.78
MTI DISTRIBUTING INC	REPAIR PARTS	\$396.14
NOTEWORTHY MUSIC SERVICES, INC	PROF SERV: EDUCATION	\$160.00
ORKIN PEST CONTROL	OTHER PROFESSIONAL SERVICES	\$200.00
PARTS TOWN, LLC	GENERAL SUPPLIES	\$4,711.83
PEPPER J.W. & SON, INC	INSTRUCTIONAL SUPPLIES	\$1,201.56
PETE'S PIANO SERVICE	PROF SERV: EDUCATION	\$900.00
PFEIL ANGELA	STAFF TRAVEL	\$30.60
PIRNAT MICHAELA	STAFF TRAVEL	\$95.00
PLUMB SUPPLY CO.	HEAT/PLUMBING SUPPLY	\$735.89
POOL TECH, A WGHK INC, COMPANY	MAINTENANCE SUPPLIES	\$464.84
POWER KATHRYN	STAFF TRAVEL	\$8.65
RELAYHUB LLC	DATA PROCESSING AND	\$6,096.17
RIVERSIDE INSIGHTS	INSTRUCTIONAL SUPPLIES	\$3,520.00
ROBBINS CASEY	DIF Grant - Staff Travel	\$33.75
ROBERTSHAW KIRSTEN	STAFF TRAVEL	\$16.00
ROCHESTER ARMORED CAR CO INC	GENERAL SUPPLIES	\$471.38
SCHIMBERG	HEAT/PLUMBING SUPPLY	\$315.07
SCHOOL BUS SALES	TRANSP. PARTS	\$4,336.65
SEYMOUR RYLEY	STAFF TRAVEL	\$27.50
SMITH OLIVIA	STAFF TRAVEL	\$28.30
SPENCER MADDISON	STAFF TRAVEL	\$85.00
SPRINGVILLE COMMUNITY SCHOOLS	TUITION OPEN ENROLL	\$2,945.71
STATE HYGIENIC LABORATORY	DUES AND FEES	\$14.50
TEGELER WRECKER & CRANE	REPAIR/MAINT SERVICE	\$654.00
THE SHREDDER	OTHER PROFESSIONAL SERVICES	\$35.00
THOMPSON TRUCK & TRAILER	TRANSP. PARTS	\$2,295.45
TOWNS KATHRYN	STAFF TRAVEL	\$72.50
TRI-CITY ELECTRIC COMPANY OF IOWA	TECH REPAIRS/MAINTENANCE	\$2,191.03
WALSH DOOR & HARDWARE	MAINTENANCE SUPPLIES	\$550.00
WEBER COMMUNICATIONS INC	REPAIR/MAINT SERVICE	\$300.00
WIELAND & SONS LUMBER CO	INSTRUCTIONAL SUPPLIES	\$1,065.00
<b>Fund Total:</b>		<b>\$350,585.59</b>
<b>Fund: LOCAL OPT SALES TAX</b>		
CMS COMMUNICATIONS	COMP/TECH HARDWARE	\$6,238.45
MIDWEST COMPUTER PRODUCTS	COMP/TECH HARDWARE	\$4,750.00
OPN ARCHITECTS, INC.	ARCHITECT	\$32,134.24
<b>Fund Total:</b>		<b>\$43,122.69</b>
<b>Fund: NUTRITION SERVICES</b>		
ANDERSON ERICKSON DAIRY CO	PURCHASE FOOD	\$21,169.58
EMS DETERGENT SERVICES	GENERAL SUPPLIES	\$2,123.53
LIMKEMANN MARGARET	GENERAL SUPPLIES	\$32.48
MARTIN BROTHERS DISTRIBUTING CO., INC	PURCHASE FOOD	\$44,592.33
OFFICE EXPRESS	GENERAL SUPPLIES	\$109.98

# Linn-Mar Community School District

## IA- Warrants Paid Listing

Criteria

Date Range: 02/06/2025 - 02/19/2025

Fiscal Year: 2024-2025

Vendor Name	Description	Check Total
PERFORMANCE FOODSERVICE - CEDAR RAPIDS	GENERAL SUPPLIES	\$5,847.39
PERFORMANCE FOODSERVICE - CEDAR RAPIDS	PURCHASE FOOD	\$63,881.41
ROBBINS DONNA	GENERAL SUPPLIES	\$45.00
<b>Fund Total:</b>		<b>\$137,801.70</b>
<b>Fund: PHY PLANT &amp; EQ LEVY</b>		
ACCESS SYSTEMS	COMPUTER/COPIER RENT	\$12,113.55
BRECKE	CONSTRUCTION SERV	\$54,188.83
DRYSPACE INC	CONSTRUCTION SERV	\$2,750.00
EASTERN IOWA CARPET CARE	CONSTRUCTION SERV	\$7,099.40
MCCOMAS LACINA CONSTRUCTION LC	CONSTRUCTION SERV	\$17,294.83
SHIVE-HATTERY INC.	CONSTRUCTION SERV	\$3,137.30
WALSH DOOR & HARDWARE	BLDG. CONST SUPPLIES	\$775.00
<b>Fund Total:</b>		<b>\$97,358.91</b>
<b>Fund: PUB ED &amp; REC LEVY</b>		
ATWATER COMPANIES INC	GROUNDS UPKEEP	\$4,172.85
ZIPPY' S SALT BARN LLC	GROUNDS UPKEEP	\$744.80
<b>Fund Total:</b>		<b>\$4,917.65</b>
<b>Fund: SALES TAX REVENUE BOND CAP PROJECT</b>		
OPN ARCHITECTS, INC.	ARCHITECT	\$3,159.64
SALOW MECHANICAL INSULATION INC	CONSTRUCTION SERV	\$1,066.31
<b>Fund Total:</b>		<b>\$4,225.95</b>
<b>Fund: STUDENT ACTIVITY</b>		
BLUE SKY PRODUCTIONS	GENERAL SUPPLIES	\$12,830.00
CEDAR RAPIDS WASHINGTON HIGH SCHOOL	DUES AND FEES	\$60.00
CRAWFORD GREG	OFFICIAL/JUDGE	\$150.00
DUGGAN KYLE	OFFICIAL/JUDGE	\$150.00
ECISOA	DUES AND FEES	\$280.00
ELSMORE SWIM SHOP/AQUATIC	GENERAL SUPPLIES	\$6.84
HY-VEE FOOD STORE-8556	GENERAL SUPPLIES	\$1,634.20
IOWA HIGH SCHOOL SPEECH ASSOC	DUES AND FEES	\$310.00
LATITUDE YOGA AND FITNESS	PROF SERV: EDUCATION	\$400.00
MCMASTER-CARR	GENERAL SUPPLIES	\$189.57
MENARDS -13127	GENERAL SUPPLIES	\$157.30
MH ADVERTISING SPECIALTIES	GENERAL SUPPLIES	\$3,199.75
PANTINI ANDY	OFFICIAL/JUDGE	\$125.00
PEPPER J.W. & SON, INC	GENERAL SUPPLIES	\$68.99
SHANLEY STEVE	GENERAL SUPPLIES	\$3,850.00
SIEREN RANDY	OFFICIAL/JUDGE	\$125.00
WEST MUSIC CO	GENERAL SUPPLIES	\$799.00
<b>Fund Total:</b>		<b>\$24,335.65</b>



Linn-Mar Community School District

IA- Warrants Paid Listing

Criteria

Date Range: 02/06/2025 - 02/19/2025

Fiscal Year: 2024-2025

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Vendor Name	Description	Check Total
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Grand Total: \$667,269.14

End of Report

LICENSE AGREEMENT  
COMMERCIAL

This license agreement (“Agreement”) is made on the Effective Date, as defined in the signature block, by Linn-Mar Community School District, and Iowa school corporation (“Licensor”), and the undersigned (“Licensee”).

1. DEFINITIONS

1.1 “Trademarks” means the word and logo marks depicted in Exhibit A.

1.2 “Licensed Product” means the products bearing the Trademarks.

1.3 “Royalty Rate” means the percentage defined in Exhibit B.

1.4 “Net Sales” means Licensee’s gross invoice amount billed to customers of Licensed Products, less discounts and allowances actually shown on the invoice and, further, less any bona fide returns supported by credit memoranda actually issued to the customers. No other costs incurred in the manufacturing, selling, advertising, and distribution of the Licensed Products shall be deducted, nor shall any deduction be allowed for any uncollectible accounts or allowances.

1.5 “Licensed Market” means the types of products that may be marked with the Trademarks, as defined in Exhibit B.

1.6 “Customers” means the people to whom Licensed Products may be sold, as defined in Exhibit B.

1.7 “Term” means the period of time, as defined in Exhibit B, starting from the Effective Date.

2. LICENSE

2.1 Scope of License. Licensor grants to Licensee a non-exclusive license to make, have made, and sell Licensed Products in the Licensed Market throughout the world to Customers. Licensee shall not have the right to sub-license beyond the extent necessary to manufacture the Licensed Products. Licensee shall make no other use of the Trademarks.

2.2 Royalty. Licensee shall pay Licensor a royalty equal to the Royalty Rate time Net Sales.

2.3 Code of Conduct. The grant of the license to the Licensee is contingent upon Licensee agreeing to and adhering to the Code of Conduct, attached at Exhibit C.

3. LICENSOR’S CONTROL

3.1 In order to protect and preserve Licensor’s rights in the Trademarks, Licensee agrees that (i) prior to the first use of the Trademarks by Licensee, Licensee shall obtain a Licensor’s approval of all aspects of such use, including quality of the Licensed Product; and (ii) once Licensee’s use of the Trademarks is initially approved by Licensor, any subsequent modification in such use, including changes in quality of the licensed Product, must be reviewed and approved by Licensor prior to implementation of such modification. Licensor may terminate this Agreement if Licensee fails to abide by these quality control provisions.

4. USE OF THE TRADEMARK

4.1 Trademark Format. Licensor retains the right to specify, from time to time, the format in which Licensee shall use the Trademarks, and Licensee shall only use the Trademarks in a format approved by Licensor.

4.2 Proper Notice and Acknowledgement. Every use of the Trademark by Licensee shall incorporate a superscript TM or a circle enclosing an R, as directed by Licensor.

4.3 Impairment of Licensor’s Rights. Whether during or after the term of this Agreement, Licensee shall not challenge or otherwise impair Licensor’s rights in the Trademarks. Licensee shall not apply for the registration of, or cause or allow the filing of an application for the registration of, a tradename, trademark or service mark which is identical to or confusingly similar to any of the Trademarks.

4.4 Licensor’s Rights and Remedies. Licensee agrees that Licensor retains, and may exercise, all rights and remedies available to Licensor as a result of Licensee’s breach of this Agreement, misuse of the

Trademarks, or any other use of the Trademarks by Licensee which is not expressly permitted by this Agreement.

## 5. TERMINATION

5.1 Termination without Cause. Either party may terminate this Agreement, with or without cause, by delivering written notice of termination to the other party, and, unless a later date is specified in such notice, termination shall be effective thirty (30) days after the date such notice is given.

5.2 Termination for Cause. Notwithstanding the provisions of Section 5.1, this Agreement shall automatically terminate without notice from Licensor if: (i) Licensee violates the Code of Conduct; (ii) Licensee attempts to assign, transfer or otherwise convey, without first obtaining Licensor's written consent, any of the rights granted to Licensee; (iii) Licensee fails to obtain Licensor's approval of Licensee's use of the Trademark in accordance with Section 3 of this Agreement; (iv) Licensee uses the Trademark in a manner in violation of, or otherwise inconsistent with, the restrictions imposed by or in connection with Section 4 of this Agreement; or (v) Licensee uses the Trademark in a manner not expressly permitted by this Agreement.

5.3 Effect of Termination. All rights granted by this Agreement, shall expire upon termination of this Agreement, and upon termination Licensee shall immediately cease and desist from all further use of the Trademarks, except that Licensee may continue to sell off Licensed Products in its inventory for a period of ninety (90) days.

## 6. REPORTING AND PAYMENTS

6.1 Licensee shall provide Licensor a report within thirty (30) days of the end of each Reporting Period, as defined in Exhibit B. The report shall detail the number of Licensed Products sold, the Net Sales of Licensed Products and royalties due. The report shall be accompanied by payment of the royalties due. If no royalties are due, the report shall so state.

## 7. MISCELLANEOUS

7.1 Indemnification. Licensee agrees to indemnify and hold harmless Licensor and its board, officers, employees, and contractors from any and all claims or allegations for damage or injury to persons or property or for loss of life or limb under any product liability, tort liability or similar cause of action arising out of or in connection with (i) its activities or (ii) the use of License Products by third parties.

7.2 Assignment. Except as permitted, Licensee shall not assign, sublicense, transfer, or otherwise convey Licensee's rights or obligations without Licensor's prior written consent.

7.3 Applicable Law. This Agreement shall be interpreted, construed, and enforced pursuant to, and in accordance with, the laws of the State of Iowa. Parties agree that jurisdiction is proper in the courts of Linn County, Iowa.

7.4 Entire Agreement. This Agreement supersedes all previous agreements, understandings, and arrangements between the parties, whether oral or written, and constitutes the entire agreement between the parties.

7.5 Amendments. This Agreement may not be modified except by an agreement in writing executed by the parties hereto.

7.6 Waivers. The waiver by either party of a breach or other violation of any provision of this Agreement shall not operate as a waiver of any subsequent breach of the same or other provision of this Agreement.

7.7 Notice. All communication to be given under this Agreement shall be in writing and shall be delivered by hand, by facsimile, by registered or certified mail through the United States Postal Service, or by courier service at the addresses listed below.

7.8 Counterparts. This Agreement may be executed in several counterparts, each of which shall be an original, but all of which together shall constitute one and the same Agreement.

**RECEIVED**

FEB 10 2025

IN WITNESS WHEREOF, the parties hereto have caused the Agreement to be executed by their duly authorized representatives as of the date first set forth above.

---

*Please print (except for your signature) and provide all the information requested.*

**Licensee: (Commercial)**

Full Name of Entity: The Throwback LLC

Purpose of Use of Licensed Materials: Apparel Sales

Contact's Title/Position: Founder

Contact's Name (print): Douglas Cloven

Contact's Signature: *Douglas Cloven* Date Signed: 8/30/2024

Contact Information: Phone: 319-383-4932

Email: dougcloven@gmail.com

Full Address: 2730 Bullis Dr.

Marion, IA 52302

---

**Licensors:**

Linn-Mar Community School District  
2999 N 10<sup>th</sup> Street, Marion, IA 52302  
District Contact: Business Services  
Email: [sofferman@linnmar.k12.ia.us](mailto:sofferman@linnmar.k12.ia.us)  
Phone: (319) 447-3145

Board President's Name (printed): Katie Lowe Lancaster, Board President

Board President's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Exhibit A

a)



b)



c)



d)



e)



f) Linn-Mar Community School District

g) Linn-Mar Lions

Exhibit B

Commercial

Royalty Rate: 8%

Licensed Markets: Everything not prohibited by Code of Conduct

Customers: Everyone

Term: One (1) year

Reporting Period: Quarterly

Exhibit C

## CODE OF CONDUCT COMMERCIAL

**Prohibited Items.** Licensee shall not use any Trademarks in connection with the promotion of sexual activity or tobacco, alcohol or illegal drug use including refraining from using the Trademarks i) in combinations with any positive or neutral mention of sexual activity, tobacco, alcohol, or illegal drugs; and ii) on any item used during sexual activity or used for consuming tobacco, alcohol, or illegal drugs.

**Supplier Performance.** Licensee is expected to provide the highest level of ethics and service in all business facets which include categories such as products and services, delivery, administration, and customer service. Licensee shall not engage in unscrupulous business practices and misrepresentations of any type. Licensee and its representatives shall be courteous, considerate, prompt, and businesslike with those whom they deal including employers, employees, suppliers, and the general public. Licensees may be subject to formal evaluations.

**Gifts.** Licensor's officials and employees cannot accept anything of value from a Licensee, such as personal gifts or gratuities, which may be construed to have been given to influence the official or employee.

**Compensation.** Licensee shall ensure that its employees and the employees of all its subcontractors, shall earn at least the minimum wage as required by the law of the location of manufacture.

**Working Conditions.** Licensee shall provide a safe and healthy working environment and have a safety program that proactively identifies and eliminates workplace hazards. Employees shall not be required to work more than the limits on the regular hours allowed by the law of the location of manufacture.

**Workers' Rights.** Employees of Licensee and subcontractors shall have the right to speak up about working conditions without fear of retaliation. No employee may be subjected to physical, sexual, or verbal harassment. No employee may be discriminated against in employment in any way on the basis of race, creed, color, religion, gender, age, national origin, marital status, sexual orientation, gender identity, covered military veteran, disability, genetic information, familial status, physical attribute, political belief/party preference, or socio-economic status.

**Legal Compliance.** Licensee shall comply with all the laws and regulation governing the workplace and Licensee's conduct of its business affairs. Where there are differences or conflicts with this Code of Conduct and the applicable laws, the higher standard will prevail.

# Cooperative Agreement

by and between UNIVERSITY OF NORTHERN IOWA and COOPERATING EDUCATIONAL AGENCIES

## Agreement Duration: (Please select one) \*

- Three year duration, expiring July 31, 2028  
 One year duration, expiring July 31, 2026

Section 262.30 CONTRACTS FOR PRACTITIONER PREPARATION provides:

The board of directors of any school district in the state of Iowa may enter into contract with the state board of regents for furnishing instruction to pupils of such school district, and for practitioner preparation for the schools of the state in such particular lines of demonstration and instruction as are deemed necessary for the efficiency of the University of Northern Iowa ... as training schools for practitioners.

AND see also Section 256.16(1)(m).

### 1. Scope of Agreement

1.1 This Agreement sets forth the roles, responsibilities, and rights of personnel associated with the cooperating educational agency, personnel associated with the University of Northern Iowa and of any student enrolled at UNI, while assigned as a student teacher, administrative intern, or for any other educational clinical experience with a cooperating educational agency.

1.2 To the extent the cooperating educational agency generates or maintains educational records related to the participating student, the cooperating educational agency agrees to comply with the Family Educational Rights and Privacy Act (FERPA) to the same extent as such laws and regulations apply to the university and shall limit access to only those employees or agents with a need to know. For the purposes of this Agreement, pursuant to FERPA, UNI hereby designates the cooperating educational agency as a school official with a legitimate educational interest in the educational record of the participating student(s) to the extent that access to the university's records is required by the cooperating educational agency to carry out the Program.

### 2. Options of Student Teachers and other Educational Experience Students

2.1 Students must be registered for the appropriate university course. Educator clinical experiences can range from 3 hours through 640 hours, depending on the experience. Principal internships are two year experience. Social work specialization students complete 500 hours of clinical experience. School Psychology practicum can range from 60 hours to 240 hours, depending on the experience. School Psychology clinical internship includes 1500 hours over 10 months-24 months, with at least 600 hours occurring in a school setting. School counseling students complete a minimum of 100 hours of practicum experience and a subsequent minimum of 600 hours of internship. Speech Language Pathology students complete 10-200 depending on experience level.

### 3. Placement of Students

3.1 Placement of practicing interns shall be accomplished on a cooperative basis between UNI and the cooperating educational agency. All participating pre-service teachers and school psychology UNI interns students have completed a background check, including criminal background and child abuse, sex abuse, and dependent adult abuse registry checks, before beginning their clinical experiences and are provided clearance certificate by UNI. Should other programs require a background check, they would want to share this process with the intern to ensure it is completed in the manner appropriate for the position. Specific to speech language pathology, each student will be informed that they must meet the health requirements, immunizations, and tests; P.P.D., Rubella, Rubeola, Varicella titer or documentation of immunity: Hepatitis B Vaccination, Training regarding OSHA Bloodborne Pathogens, and Tuberculosis Standards. Vaccination waivers may be accepted on a case by case basis, depending on the site.



3.2 Placement shall be initiated by the university coordinator (hereinafter referred to as coordinator) upon completion of an application from each student setting out the student's qualifications/background and the assignment(s) needed to meet course requirements, certification, endorsement, and approval area standards.

3.3 Requests for assignment of practicing interns may be accompanied by suggested names of individuals who are recommended to serve as a cooperating teacher/educational agency supervisor by the coordinator.

3.4 The University of Northern Iowa reserves the right to decline the assignment of a student to classroom teachers/educational agency supervisors who may request a student. However, said decision shall not be based on race, creed, color, sex, national origin, disability, age, religion, gender identity, sexual orientation, veteran or military status or on any other basis protected by state and/or federal law.

3.5 The cooperating educational agency reserves the right to refuse assignment to any given practicing interns. However, said decision shall not be based on race, creed, color, sex, national origin, disability, age, religion, gender identity, sexual orientation, veteran or military status or on any other basis protected by state and/or federal law.

#### **4. Termination or Change of Assignment**

4.1 The coordinator or cooperating educational agency may, for good cause, terminate or change the assignment of any practicing intern. Prior to reaching a decision the coordinator and the cooperating educational agency designee shall consult with the cooperating teacher/educational agency supervisor and all other concerned parties regarding the reason(s) for termination or change in assignment. If the district desires to terminate or change an assignment, the practicing intern will not return to the District Facility while awaiting the required consultation before the termination/change of assignment.

#### **5. Supervision of Practicing Interns**

5.1 A member of the university faculty, or designee, will serve as the coordinator or supervisor of the clinical or educational experiences for the purpose of administering the program and supervising/evaluating the practicing interns in cooperation with the cooperating teachers/educational agency supervisors who guide and direct the practicing interns.

5.2 The identification, selection and continued use of qualified mentor professionals/educational agency supervisors shall be the joint responsibility of the coordinator and the administrators of the cooperating educational agencies.

5.3 The practicing intern remains subject to all UNI applicable policies, rules and regulations, and Professional Code of Ethics as well as those of the cooperating educational agency.

5.4 All interaction between the mentoring professional/educational agency supervisor or nonpublic cooperating educational agency and the practicing intern shall occur without regard to religious education, religious indoctrination, religious beliefs, or involvement with religious activities. Practicing interns shall not be present or participate in the instruction or discussion of religious subjects or any other religious activity of the cooperating educational agency.

5.5 Interns shall be appropriately supervised and supported as they engage in the clinical experience. Supervision by the cooperating educational agency while on site is expected as appropriate for the position. The cooperating educational agency should remain in close communication with the university throughout the duration of the experience.

#### **6. Evaluation**

6.1 Evaluation of the practicing intern shall be a shared responsibility. The coordinator or supervisor, the mentoring professional/educational agency supervisor, the practicing intern, and others knowledgeable about the performance of the intern shall be involved. Evaluation is comprehensive, continuous, specific, and individualized. The evaluation in the nonpublic educational agency shall be based on non-religious criteria.

6.2 Evaluations appropriate to the length of the internship/clinical experience will be required. Shorter internships may utilize only a final evaluation by the university supervisor as well as mentor professionals, along with intern reflections. Longer internships will include multiple evaluations occurring over the duration of the clinical experience completed by mentor professionals as well as university supervisors.

However, the coordinator, as the designated UNI official, is responsible for the final evaluation.

## **7. Status, Authority, and Tort Liability Protection of Interns**

7.1 Practicing Interns shall have status and authority in accordance with section 256.16 Code of Iowa. (see section 7.4 for out of state internships)

7.2 Practicing Interns engaged under the terms of this contract in a public school shall be entitled to the same tort liability protection under the provisions of section 670.8 Code of Iowa, as is afforded by said section to officers and employees of the school district/agency during the time they are so assigned.

7.3 Practicing Interns engaged under the terms of this contract in a non-public school shall be named as additional insured under the liability insurance coverage of the cooperating nonpublic school during the time they are so assigned. The cooperating nonpublic school shall provide a certificate of insurance to the University of Northern Iowa as evidence of such coverage prior to the beginning of the student teacher's activities pursuant to this agreement.

7.4 Practicing Interns engaged under the terms of these contracts outside of the state of Iowa will be required to acquire liability insurance (verified by the University) prior to the commencement of the internship or field experience. The limits of such coverage shall be a minimum of 1,000,000 per occurrence.

## **8. Confidentiality**

8.1 Practicing interns are expected to maintain and uphold the level of confidentiality that is appropriate to the policies and regulations of the experience in which they are engaged. This confidentiality includes protection of identities, likeness, records, and any additional information that would be classified as confidential information for the participating educational agency.

## **9. Compensation to Mentor for Work with Practicing Interns**

9.1 Compensation varies within and among the various educational preparation programs. The University of Northern Iowa agrees to pay compensation to the cooperating teacher (262.75 Code of Iowa) in the amount of five-hundred dollars (\$500) per student teacher assigned who completes the full semester student teaching period. Compensation for shorter internships for pre-service teachers will be \$100. Assignment of less than the full and normal duration will be paid on a prorated basis for their work with the intern. There is no monetary compensation for those serving as mentor administrators or for school psychology internship or practicum mentors.

9.2 For placements in which monetary compensation is provided, cooperating educational agencies agree to provide a listing of the assigned mentors in their district and to forward social security numbers when direct payment is made to these mentors OR allow the University of Northern Iowa to request from the individual mentor their social security number and home address for direct payment.

## **10. Compensation of practicing intern (program specific)**

10.1 A written contractual agreement specifying the School Psychology Intern as a permanent employee for a term of 10-months (a school calendar year) and terms of compensation including the amount of compensation and proration of salary in 12-month or 22 bi-weekly equal paychecks. The contract further specifies that the intern is limited to employment for the period of appointment, is not guaranteed employment beyond that period, nor is required to stay in employment of the member of the field agency. This agreement should include a salary that is at a level commensurate with the intern's experience and at a level that allows the intern to be fully devoted to training. It should also include employee benefits consistent with those of other full-time school psychologists. School psychology practicum students are not expecting compensation.

10.2 With the exception of School Psychology Intern, the student interns are not employees of the placement site.

10.3 Masters of Social Work interns are not expecting compensation. However, some programs do provide an educational stipend for these interns. This stipend is not required but is allowable.

10.4 School counseling interns are not expecting compensation. However, if they are hired as school counselors under a Class G License by the school district, they should receive a salary that reflects their experience, along with employee benefits consistent with those provided to other full-time staff members in the building.

10.5 Educational Leadership interns are not expecting compensation during their practicum experience. However, if they have completed 75% of their program requirements and are serving as a substitute administrator under a conditional administrative license, they should be compensated at the standard district rate.

10.6 Pre-Service educator interns are not eligible for a salary during student teaching as the teacher of

record. However, a district can provide an educational stipend should they wish to do so. Pre-service educators can serve as substitute teacher if they hold a substitute teaching authorization and should be compensated appropriately for this work. Note: Time spent as a substitute teacher during the student teaching placement does not count toward the minimum requirement of student teaching.  
10.7 Speech Language Pathology interns are not expecting compensation. However, some programs do provide an educational stipend for these interns. This stipend is not required but is allowable.

**11. Workload expectations and settings**

11.1 For clinical placements that carry a workload (ie student teaching, social work) it is not expected that an intern would carry a workload that is as extensive with the degree of independence as the mentor. This is to allow time for the practicing intern to adequately reflect and grow in their own practices.

11.2 The intern setting provides a space that affirms and respects diversity and differences in staff, populations served, and interns completing their clinical experiences.

11.3 Mentors are open and share expectations with their assigned practicing intern(s) while also providing guidance and support needed to allow for a productive and educational experience.

11.4 Assure that the candidate is able to engage in the necessary activities, procedures, and protocols as appropriate to the placement.

11.5 Assure that the candidate is appropriately supervised and supported during their experience.

11.6 Abide by program specific roles and responsibilities (such as logging hours, orientation to the educational setting, etc)

**Cooperating Educational Agency Name: \***

Agency Name      Agency type (school, AEA, etc)

**Printed Name of Signing Official \***

First Name      Last Name

**Email address of signing official: \***

example@example.com

**Date \***

Month   Day   Year

**University of Northern Iowa, Designated Signing Official:**

**Dr. Benjamin Forsyth**  
Associate Dean, Undergraduate Studies and Teacher Education  
College of Education

Submit



PO Box 841393  
 Dallas, TX 75284-1393  
 Phone: 800-527-7510 Fax: 800-899-0149  
 Visit us at www.bsnsports.com

# Exhibit 804.3

Order Summary	
Cart #:	12160913
Purchase Order #:	Football Video Scoreboard
Cart Name:	Linn Mar HS Football Scor
Order Date:	09/05/2024
Estimated Delivery:	02/24/2025
Payment Terms:	NT30
Ship Via:	
Ordered By:	Tonya Moe

Contact Your Rep

Nick Greteman Email:ngreteman@bsnsports.com | Phone:712-790-6777

**Sold to**  
**1791981**  
**LINN-MAR Comm SCHOOL**  
 3556 WINSLOW ROAD  
 MARION IA 52302-8978  
 USA

**Ship To**  
**3390968**  
**Linn-Mar High School**  
 Tonya Moe  
 3111 N 10TH STREET  
 MARION IA 52302  
 USA

**Payer**  
**1791981**  
**LINN-MAR Comm SCHOOL**  
 3556 WINSLOW ROAD  
 MARION IA 52302-8978  
 USA

Item Description	Qty	Unit Price	Total
<b>Daktronics Video Scoreboard 17 x 32</b> Item # - NSPHG	1 EA	\$ 283,661.00	\$ 283,661.00
<b>Sportsound 1500HD Sound Cabinet * BLACK*</b> Item # - NSPHG	1 EA	\$ 50,339.00	\$ 50,339.00

Subtotal:	\$334,000.00
Other:	\$0.00
Freight:	\$1,600.00
Sales Tax:	\$0.00
Order Total:	\$335,600.00
Payment/Credit Applied:	\$0.00
<b>Order Total:</b>	<b>\$335,600.00</b>

2/Feb/2025  
 Quote Valid for: 60 days

Terms:  
 -30% with the order,  
 -60% Payment  
 before shipment,  
 -10% Net 30 days from  
 shipment



**APPENDIX A**  
**Linn-Mar Community School District**  
**INTERAGENCY AGREEMENT**

This Interagency Agreement (the “Agreement”) is made by and between the Linn-Mar Community School District (hereafter “LMCSD” or “District”), 3556 Winslow Road, Marion, Iowa, 52302, and (hereafter “Partner Organization”), further identified below.

**Name:** Hand In Hand Early Care & Education Center

**Address:** 3524 35<sup>th</sup> Avenue

**City, State, Zip:** Marion, IA 52302

**Phone:** (319) 373-3630

Pursuant to this Agreement, the Partner Organization shall provide a Before/After School Wrap Daycare for Preschool for the District. The parties agree that this Agreement will be performed in accordance with the following conditions:

**GENERAL CONDITIONS**

**Expected Outcome:** All students will have access to a safe and enriching out-of-school program designed to support their access in school and development as productive members of the community. The Before/After School Wrap Daycare for Preschool will align their program goals to be similar or compatible with goals and objectives of the District. Nothing in this Agreement shall be construed as creating any responsibility on the District to oversee, supervise, or in any manner direct the Partner Organization in this endeavor.

**Scope of Work and Schedule:** The Partner Organization shall provide before and after school and wrap daycare for preschool at the following District school building(s):

- Linn Grove Elementary School located at 2301 50th Street, Marion, IA 52302 (the “Facility”).

**I. The District Building Administrator(s) or Their Designee will Carry Out the Following Activities to Support the Partner Organization:**

**A. Communication**

1. Meet bi-monthly with the Wrap Daycare for Preschool Director;
2. Publish in student handbooks, parent newsletters, staff communications, and other publications a notice that the District has an agreement with the Partner Organization to provide before and after wrap daycare for preschool;
3. Communicate changes in District policies and practices which will have an impact on the operation of the program (e.g., changes in attendance areas, bell schedule, etc.), to the Wrap Daycare for Preschool Director; and
4. Ensure that the program space is reserved in the District’s facilities use database.

**B. Provision of Space**

1. Provide and maintain dedicated space within the Facility, including restrooms and entrances, that complies with Iowa Department of Human Services (“DHS”)

licensing requirements. Any DHS citations regarding space issues, if any, are to be addressed by the building administrator or their designee. This Agreement serves as the facilities use approval for the Partner Organization;

2. Playground areas may be available for the program but must be coordinated with the building administrator or designee in advance. The Partner Organization is responsible for supervision of all outdoor areas used by the Partner Organization, its employees, agents, and invitees;
3. Provide at least two weeks' notice to the Wrap Daycare for Preschool Director if dedicated space within the Facility is not available during program hours, allowing the Director sufficient time to make necessary adjustments to ensure the program remains operational;
4. Provide keys or access cards for access to the Facility, shall be provided for designated representatives of Partner Organization. The Partner Organization shall ensure that the Facility is locked and secured as needed. Keys or access cards for access to the Facility must be returned to the District at the termination of this Agreement; and
5. The District may enter the dedicated space within the Facility without the prior approval of Partner Organization during the term of this Agreement, so long as such entry does not unreasonably interfere with Partner Organization's use. The District may enter the dedicated space within the Facility at any time for emergencies.

#### **C. Collaboration**

1. Include the Director in building professional development opportunities as appropriate (i.e., PBIS, behavior de-escalation, ALICE training); and
2. Refer students and families to the program.

### **II. District Administration will Carry Out the Following Activities to Support the Partner Organization:**

#### **A. Provide Professional Development**

1. Adult and Pediatric CPR and First Aid Training annually to WRAP Care staff;
2. Relevant District policies, including confidentiality, to ensure compliance with Family Educational Rights and Privacy Act ("FERPA"), annually to the Preschool WRAP Care Director; and
3. Facilitate one meeting a year with the Partner Organization to support best practice and exchange information.

#### **B. Administrative Support**

1. Process background checks for volunteers;
2. Include WRAP Care staff in communications to families regarding late start, early release, and school cancellations; and
3. Maintain and update program information and links on the District website.

### **III. Manage Interagency Agreement**

#### **Partner Organization Will Carry Out the Following:**

##### **A. Management**

1. Will provide before and after school preschool daycare as agreed upon by the

parties. Hours of operation and program schedule, including non-school days, will be posted on the program's website and communicated with the building administrator;

2. Employ a Director who is to be assigned to the program to handle all operational matters;
3. Secure and maintain a license from DHS to provide before and after preschool WRAP care and comply with all statutes, laws, ordinances, and codes applicable thereto;
4. Employ adequately trained and sufficient staff for the number of children accommodated in the childcare program. The Partner Organization shall be solely responsible for the quality of the childcare program and the certification of its employees;
5. Coordinate all staffing, supplies, student enrollments, and other aspects of the preschool WRAP care operations. Operational expenses are the sole responsibility of the Partner Organization;
6. Comply with guidelines established by the United States Department of Agriculture (USDA) regarding healthy snacks;
7. Establish waitlist guidelines for families, ensuring prioritization as needed; and
8. By October 1st of each year, each Preschool WRAP Care Director will submit to the District's Chief Financial Officer the documents listed below. These may be transmitted as digital files using a single document with the three files attached or via paper copy. Please provide the name of the organization and contact information for the person sending this documentation.
  - a. The most recent fiscal year-end financial statement for each program site;
  - b. The most recent copy of the Partner Organization's IRS 990 (long form preferred); and
  - c. A current copy of the Partner Organization's certificate of insurance. If the policy expires during the agreement period, please provide an updated certificate at that time.

#### **B. Communication and Collaboration**

1. The Preschool WRAP Care Director will collaborate with the building administrator on the schedule and hours of operation;
2. The Preschool WRAP Care Director will meet every bi-monthly with the building administrator or their designee;
3. The Preschool WRAP Care Director will participate in FERPA training annually;
4. The Preschool WRAP Care Director will participate in training annually on relevant district policies, including confidentiality, to ensure compliance with FERPA;
5. The Partner Organization will secure from all parents a signed release of information to exchange information with the District regarding the students in the program;
6. Provide a list of staff to the building administrator of all Partner Organization staff and update as new staff are hired. Program staff will wear identification to identify themselves as Preschool WRAP Care staff; and
7. Maintain a program website which includes the Partner Organization's parent handbook, non-discrimination policies, grievance procedures, DHS complaint contact information and contact information for the Partner Organization's supervisor.

### **C. Accessibility**

1. Establish a process for priority enrollment to serve students in need, (e.g., homelessness, foster care, etc.) determined by a District-approved formula. The formula for priority enrollments will be reviewed annually by the parties;
2. Pursuant to the Americans with Disabilities Act (ADA), a child with disability is entitled to an equal opportunity to participate in before and after school preschool daycare programs. The program will make all reasonable accommodations in policies, practices, or procedures to accommodate children with disabilities, unless accommodations would pose an undue burden or fundamentally alter the nature of the program. If the program is unable to provide accommodations for a child with a disability, a meeting must be scheduled with the building principal, or their designee, and the District's Executive Director of Student Services before a decision is made to ensure demonstration of an undue burden or a fundamental alteration to the program has been met;
3. Collaborate with the District on grant applications and/or other resource development activities to increase accessibility of the program;
4. Refer families to potential sources of funding for the program, either through State Child Care Assistance or other grants;
5. Assist parents in the application process for State Child Care Assistance;
6. Waive school-year registration and activity fees for families on free and reduced lunch (which can be disclosed to the Partner Organization by the family);
7. By October 1<sup>st</sup> and May 31<sup>st</sup> of each year, provide to the District's Executive Director of Student Services a report with the number of students served in the program, demographic information: race, ethnicity, gender, disability, and the number of students receiving State Child Care Assistance, or other grants;
8. By October 1<sup>st</sup> and May 31<sup>st</sup> of each year, provide to the District's Executive Director of Student Services, a report of the demographic information for the students denied, suspended, or expelled from the program; and
9. A student previously denied, suspended, or expelled from the program will be considered for re-entry on an annual basis.

### **D. Compliance with District Policies, Federal, State, and Local Laws**

1. The Partner Organization agrees to follow all applicable District policies;
2. The Partner Organization shall comply with applicable federal, state, and local laws and regulations specifically including, but not limited to, prohibitions on alcohol use and smoking in the building and on the grounds of the building pursuant to the Iowa Code Chapter 142D and restrictions on sex offenders pursuant to Iowa Code Chapter 692A; and
3. The Partner Organization shall not use, nor permit the use of, the Facility for any purpose which would adversely affect the value or character of the Facility or cause the Facility to lose exempt status for tax purposes.

## **IV. Allowable Costs and Payment**

- A.** The Partner Organization shall be responsible for providing the services described in this Agreement to students of the District whose families desire such services from Partner Organization. The Partner Organization may establish a fee for the cost of participation. The fee will be established based on staffing costs and other expenses;
- B.** Payment of fees established for participation in the Preschool WRAP Care



Program shall be the responsibility of the families. The District shall make no financial payments to Partner Organization in connection with the services provided under this Agreement and the Partner Organization shall make no claim against the District for any such payments;

- C. The Partner Organization will make all reasonable efforts to make the Preschool WRAP Care Program accessible for all families. The Partner Organization will be responsible for accessing State Child Care Assistance, grant funding or other funding to support families who have limited ability to pay; and
- D. Pursuant to Board Policy 1004.1-R, the District will not assess any fees to the Partner Organization, as the programming is intended to benefit the District and its students.

## **V. Maintenance**

- A. The District shall be responsible for routine maintenance, snow removal, and lawn care of the Facility as part of its normal operation of the building;
- B. The Partner Organization shall be responsible for day-to-day aspects of operation of the dedicated space within the Facility during the term of use of the Agreement by the Partner Organization;
- C. The Partner Organization shall make no alterations, additions, or improvements to the dedicated space within the Facility without the prior written approval of the District. The parties agree that the Partner Organization shall be responsible for all costs associated with any alterations, additions, or improvements made by Partner Organization. Any such alterations, additions, or improvements permitted hereunder to be made by the Partner Organization shall be solely in furtherance of the use of the dedicated space within the Facility for the purpose for which the dedicated space within the Facility is used and shall become the property of the District, unless otherwise agreed by the parties; and
- D. The Partner Organization agrees to accept the dedicated space within the Facility in its present condition and configuration. The Partner Organization shall act as a reasonably prudent person to keep the dedicated space within the Facility clean and free and clear of all obstructions and nuisances in a reasonable and proper manner. The Partner Organization shall not permit the dedicated space within the Facility to be damaged or depreciated in value by any negligence or other act or omission of the Partner Organization or its directors, officers, employees, agents, representatives, invitees, or visitors, and the Partner Organization agrees to be responsible for any such damages.

## **VI. Background Checks**

- A. The Partner Organization shall be responsible for conducting background checks on all employees, contractors, and other paid personnel provided by the Partner Organization under this Agreement. The background checks will be conducted in accordance with DHS licensing regulations and will include criminal records screening through the Iowa Department of Criminal Investigation, DHS's child abuse registry, and the Iowa Sex Offender Registry;

- B. All volunteers shall be required by the Partner Organization to participate in the District's background check process. The Partner Organization shall complete and submit the District background check form for each volunteer to District in accordance with the timelines set by the District. The background checks will be conducted by the District in accordance with its usual procedures and standards for volunteers; and
- C. The Partner Organization agrees that violation of the requirements regarding background checks can result in immediate termination of this Agreement by the District following review of the violation by the District with the Partner Organization.

## **VII. Insurance**

- A. The Partner Organization shall carry, at all times, and maintain in full force and effect, at its sole expense, General Liability, Professional Liability, and Sexual & Physical Abuse Liability insurance in the minimum amount of one million dollars (\$1,000,000) per occurrence, and the aggregate of two million dollars (\$2,000,000). An umbrella policy of one million dollars (\$1,000,000). If transportation is provided by the Partner Organization an auto liability policy shall also be provided;
- B. The Partner Organization shall carry Workers Compensation insurance on its employees in amounts required by law. All such insurance shall be carried with an insurance company with an A.M. Best rating of A- or higher; and
- C. The District shall be named as an additional insured on the General Liability policy. The Partner Organization shall provide proof of such insurance annually to the District by October 1<sup>st</sup> of each year and upon renewal of the Partner Organization's insurance policy.

## **VIII. Confidentiality**

- A. The Partner Organization shall secure a Consent to Release and Exchange of Information from all parents of children participating in the program. The Partner Organization will be provided with confidential information concerning the District and its students only as necessary for the reasonable operation of the program and only to the extent permitted by applicable law. The Partner Organization and the District agree to treat as confidential all information provided by and relating to any of its students. The Partner Organization and the District shall use the confidential information solely for the purposes stated under this Agreement and shall ensure that no individual, other than those who have the need for said information in the performance of job duties called for under this Agreement, shall have access to said information;
- B. The Partner Organization and the District agree not to disclose or share said information with any other individual or organization, including, but not limited to, other staff or board members at the Partner Organization not associated with the specific Preschool WRAP Care Program, unless an appropriate release of information has been signed by the student's parent or legal guardian;

- C. The Partner Organization and the District agree to comply with all applicable confidentiality laws relating to this Agreement, including, but not limited to, FERPA, 20 USC 1232g and corresponding regulations at 34 CFR Part 99; and
- D. The Partner Organization and the District agree that violation of this provision can result in immediate termination of this Agreement following review of the violation by both parties, and/or that the District, at its sole discretion, may require the Partner Organization immediately reassign any Partner Organization employee that violates this section to an assignment/position that is not associated with the District.

**IX. Indemnification**

- A. The Partner Organization shall defend, indemnify, save, and hold harmless the District, and its directors, officers, employees, and agents, from and against any and all claims, liabilities, court awards, judgments, damages, losses, costs, and expenses (including reasonable attorney's fees) incurred as a result of any acts or omissions of the Partner Organization in the performance of this Agreement, except to the extent resulting from gross negligent acts or omissions on the part of the District; and
- B. All insurance policies covering the Partner Organization's Preschool WRAP Care Program shall include the District as an additional insured and shall include a Governmental Immunities Endorsement which does not waive any of the defenses of governmental immunity available to the District under Section 670.4 of the Code of Iowa, as it now exists and as it may be amended from time to time.

**X. Status of Parties**

- A. Nothing in this Agreement is intended to create, or will be deemed or construed to create, any relationship between the parties other than that of independent entities contracting with each other solely for the purpose of effecting the provisions of this Agreement. No joint venture, partnership, employment, or organization relationship exists between the District and the Partner Organization as a result of this Agreement, and neither party, nor any of their respective agents, employees, subcontractors, or representatives, will be construed to be the agent, employee, subcontractor, or representative of the other. Neither party has the authority to create any obligations for the other, or to bind the other to any representation, statement, or document; and
- B. The Partner Organization shall in all instances be considered the employer of the personnel providing the services under this Agreement and shall be responsible for all obligations in connection with this employer-employee relationship, including but not limited to payment of wages and benefits, and the provision of requisite insurance, including, but not limited to, workers' compensation insurance.

**XI. Attorney's Fees**

In the event that it shall become necessary for either party to institute legal

proceedings against the other party for recovery of any amounts due and owing under the Agreement, it is expressly agreed that the prevailing party in any such action shall be entitled to recover from the non-prevailing party all costs related to such collection, including reasonable attorney fees and all expert witness fees incurred during pre-suit collection attempts, suit, and post judgment, appeal, or settlement collection. The obligations in this section shall survive expiration or termination of this Agreement.

**XII. Entire Agreement; Severability**

This Agreement constitutes a complete understanding of the parties with respect to the subject matter herein and supersedes, replaces, and merges all prior understandings, promises, representations, and agreements, written or oral, relating thereto. If any provision of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then such provision shall be modified to the extent necessary to be valid and enforceable, and all other provisions of this Agreement shall remain in full force and effect.

**XIII. Notice**

Any notice required or permitted by this Agreement will be deemed to be delivered, and thus effective, when personally received, or received by the United States mail, postage prepaid, certified mail return receipt requested, or receipt is refused, addressed to the party at the addresses set forth on the first page of this Agreement, with attention to the District's Executive Director of Student Services and at the Partner Organization.

**XIV. State Law and Jurisdiction**

To the extent not preempted by federal law, this Agreement shall be construed in all respects under the laws of the State of Iowa. The parties agree that any litigation arising between them related to this Agreement shall be initiated and maintained in Linn County, Iowa.

**XV. Assignability**

The Partner Organization's obligations under this Agreement may not be assigned, or delegated, or transferred in any manner, without the express written consent of the District.

**XVI. Miscellaneous**

The parties hereto have executed this Agreement as of the dates shown next to their signatures below. The Partner Organization and the District acknowledge that each of them has carefully read this Agreement, that each of them has had the opportunity to consult an attorney and/or certified public accountant to have any questions concerning this Agreement explained to them, and that each of them understands its final and binding effect, that the only promises made to the Partner Organization and the District to sign this Agreement are those stated in this Agreement and that the Partner Organization and the District are each signing this Agreement voluntarily.

**XVII. Term**

The term of this Agreement shall be for the period commencing July 1, 2025, and continuing until terminated as follows. Either party may terminate this Agreement at

any time by providing the other party with at least ninety (90) days prior written notification of termination. It is the intent of the parties that the Preschool WRAP Care Program shall be continued for subsequent school years unless and until terminated by either party.

**XVIII. Counterparts: Binding**

This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original, but all of which together shall constitute the same instrument. This Agreement is binding upon and shall inure to the benefit of the parties and their respective successors and permitted assigns.

**Approved and Agreed:**

**District:**

Lori Manley, Linn Grove Principal

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

By: \_\_\_\_\_  
(Signature)

Melissa Frick, Exec Director of Student Services

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

By: \_\_\_\_\_  
(Signature)

Katie Lowe Lancaster, Board President

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

By: \_\_\_\_\_  
(Signature)

**Partner Organization:**

Preschool WRAP Care Director

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

By: \_\_\_\_\_  
(Signature)

**Partner Organization:**

Title: \_\_\_\_\_

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

By: \_\_\_\_\_  
(Signature)

## School Finance Report January 31, 2024

### 58% of the School Year Complete

	Current Budget	Beginning Fund Balance	Y-T-D Revenue	Exp This Mon	Exp. Last Month	Exp Y-T-D	% Exp (Budget)		Balance (Budget)	Balance (Revenues)	Balance (Fund)
1) Instructional (1000-1999)	\$71,715,574			\$5,375,566	\$5,664,964	\$28,255,857	39.4%		\$43,459,717		
2) Support Services(2000-2999)	\$34,446,929			\$2,724,623	\$2,602,559	\$17,230,925	50.0%		\$17,216,004		
3) Non-Instructional(3000-3999)	\$5,195,434			\$405,487	\$425,852	\$2,124,869	40.9%		\$3,070,565		
4) Other Expenditures((4000-6100)	\$28,622,071			\$1,942,631	\$2,428,505	\$11,162,452	39.0%		\$17,459,619		
5) Interfund Transfers	\$9,139,607			\$656,909	\$656,909	\$4,598,361	50.3%		\$4,541,246		
<b>Total</b>	<b>\$149,119,615</b>			<b>\$11,105,215</b>	<b>\$11,778,789</b>	<b>\$63,372,463</b>	<b>42.5%</b>		<b>\$85,747,152</b>		
Operating Fund-10	\$104,275,199	\$7,069,549	\$50,717,608	\$8,269,494	\$8,353,878	\$44,825,419	43.0%		59,449,780	5,892,189	12,961,738
Activity-21	\$1,050,000	\$854,019	\$592,297	\$90,934	\$104,255	\$554,925	52.9%		495,075	37,371	891,391
Management-22	\$2,013,202	\$2,308,570	\$822,545	\$1,000	\$104,545	\$1,837,863	91.3%		175,339	(1,015,317)	1,293,252
PERL-24	\$503,663	\$122,738	\$186,964	\$11,286	\$10,404	\$226,429	45.0%		277,234	(39,464)	83,274
SAVE-33	\$10,862,141	\$5,742,146	\$5,346,198	\$1,887,288	\$662,274	\$6,426,192	59.2%		4,435,949	(1,079,994)	4,662,152
Other Capital Projects-31, 32, 35	\$10,750,000	\$14,530,980	\$16,354	\$331,027	\$866,884	\$3,608,010	33.6%		7,141,990	(3,591,656)	10,939,324
PPEL-36	\$5,431,703	\$4,559,679	\$3,307,240	\$109,681	\$98,934	\$1,467,590	27.0%		3,964,113	1,839,650	6,399,329
Debt Service-40	\$9,125,707	\$347,991	\$3,053,131	\$0	\$1,151,887	\$2,313,237	25.3%		6,812,470	739,894	1,087,885
Nutrition-61	\$4,648,000	\$3,104,643	\$1,882,447	\$380,504	\$389,314	\$1,892,859	40.7%		2,755,141	(10,412)	3,094,231
Aquatic Center-65	\$410,000	\$294,394	\$197,518	\$22,070	\$23,809	\$182,375	44.5%		227,625	15,144	309,538
Student Store-68	\$50,000	\$26,950	\$38,605	\$1,930	\$12,605	\$37,566	75.1%		12,434	1,039	27,989
<b>Total</b>	<b>\$149,119,615</b>	<b>\$38,961,658</b>	<b>\$66,160,908</b>	<b>\$11,105,215</b>	<b>\$11,778,789</b>	<b>\$63,372,463</b>	<b>42.5%</b>		<b>85,747,152</b>	<b>2,788,445</b>	<b>41,750,103</b>

## Linn-Mar Community School District

### Cash Balances

Fiscal Year: 2023-2024

Date Range: 07/01/2023 - 01/31/2024

Account Number	Title	Beginning Balance	Increases Debits	Decreases Credits	Cash Balance
10.0000.0000.000.0000.111001	ISJIT-General Fund	3,054,067.04	5,104,589.28	13,082.49	8,145,573.83
10.0001.0000.000.0000.101000	CASH IN BANK	4,639,859.26	68,346,217.98	72,598,405.75	387,671.49
10.0002.0000.000.0000.101000	CASH IN BANK	5,144.68	23,888.15	23,867.10	5,165.73
21.0000.0000.000.0000.111001	ISJIT - Student Activity	0.00	905,627.11	0.00	905,627.11
21.0000.0000.000.0000.111011	1.555 RESERVE CD	0.00	408.00	408.00	0.00
21.0001.0000.000.0000.101000	CASH IN BANK	1.00	80,618.08	80,618.08	1.00
21.0002.0000.000.0000.101000	CASH IN BANK	858,359.65	2,865,124.44	3,735,124.49	(11,640.40)
22.0000.0000.000.0000.111001	ISJIT - Management	0.00	754,689.33	0.00	754,689.33
22.0006.0000.000.0000.101000	CASH IN BANK	2,302,092.46	849,616.02	2,613,145.65	538,562.83
24.0001.0000.000.0000.101000	CASH IN BANK	0.00	24,869.54	24,869.54	0.00
24.0003.0000.000.0000.101000	CASH IN BANK	165,083.84	188,034.89	242,771.70	110,347.03
33.0003.0000.000.0000.101000	CASH IN BANK	5,134,851.29	6,076,716.79	6,430,503.23	4,781,064.85
35.0003.0000.000.0000.101000	CASH IN BANK	109,897.32	11,990,471.68	7,437,429.25	4,662,939.75
35.0008.0000.000.0000.101000	CASH IN BANK	133.62	0.04	133.66	0.00
36.0003.0000.000.0000.101000	CASH IN BANK	4,974,699.14	3,322,130.03	1,894,208.90	6,402,620.27
40.0003.0000.000.0000.101000	CASH IN BANK	330,487.30	7,668,995.34	2,313,236.67	5,686,245.97
61.0000.0000.000.0000.111001	ISJIT - Nutrition	0.00	2,515,630.94	0.00	2,515,630.94
61.0001.0000.000.0000.101000	CASH IN BANK	0.00	1,502,205.81	1,502,205.81	0.00
61.0004.0000.000.0000.101000	CASH IN BANK	3,221,671.90	2,519,322.71	4,800,695.23	940,299.38
65.0001.0000.000.0000.101000	CASH IN BANK	0.00	197,563.95	197,563.95	0.00
65.0002.0000.000.0000.101000	CASH IN BANK	371,671.34	201,980.53	246,750.34	326,901.53
68.0002.0000.000.0000.101000	CASH IN BANK	26,949.64	38,790.10	37,750.62	27,989.12
		25,194,969.48	115,177,490.74	104,192,770.46	36,179,689.76

End of Report

## School Finance Report January 31, 2025

**58% of the School Year Complete**

	Current Budget	Beginning Fund Balance	Y-T-D Revenue	Exp This Mon	Exp. Last Month	Exp Y-T-D	% Exp (Budget)		Balance (Budget)	Balance (Revenues)	Balance (Fund)
1) Instructional (1000-1999)	\$71,955,000			\$5,172,045	\$5,486,241	\$28,602,399	39.8%		\$43,352,601		
2) Support Services(2000-2999)	\$34,849,700			\$2,961,343	\$2,520,756	\$17,746,758	50.9%		\$17,102,942		
3) Non-Instructional(3000-3999)	\$5,207,500			\$407,339	\$369,703	\$2,118,273	40.7%		\$3,089,227		
4) Other Expenditures((4000-6100)	\$28,110,865			\$376,589	\$4,283,850	\$16,460,562	58.6%		\$11,650,303		
5) Interfund Transfers (000910)	\$8,820,274			\$621,472	\$621,472	\$5,050,304	57.3%		\$3,769,970		
<b>Total</b>	<b>\$148,943,339</b>			<b>\$9,538,788</b>	<b>\$13,282,022</b>	<b>\$69,978,296</b>	<b>47.0%</b>		<b>\$78,965,043</b>		
Operating Fund-10	\$102,500,000	\$7,108,796	\$51,968,813	\$8,070,161	\$7,952,261	\$44,604,832	43.5%		57,895,168	7,363,981	14,472,777
Activity-21	\$1,100,000	\$1,004,117	\$650,043	\$136,959	\$83,457	\$674,279	61.3%		425,721	(24,236)	979,882
Management-22	\$2,800,000	\$2,014,469	\$1,340,787	\$1,050	\$46,682	\$2,805,316	100.2%		(5,316)	(1,464,529)	549,940
PERL-24	\$248,000	\$37,667	\$211,027	\$12,298	\$4,699	\$74,598	30.1%		173,402	136,429	174,096
SAVE-33	\$13,562,000	\$19,890,609	\$6,446,434	\$658,906	\$2,772,118	\$11,763,553	86.7%		1,798,447	(5,317,119)	14,573,491
Other Capital Projects-31, 32, 35	\$4,116,000	\$6,493,636	\$219,294	\$36,900	\$522,228	\$3,559,513	86.5%		556,488	(3,340,219)	3,153,418
PPEL-36	\$4,931,663	\$6,280,709	\$2,710,457	\$208,349	\$322,200	\$2,054,152	41.7%		2,877,511	656,305	6,937,014
Debt Service-40	\$15,125,676	\$542,598	\$2,984,606	\$0	\$1,201,630	\$2,295,827	15.2%		12,829,849	688,779	1,231,377
Nutrition-61	\$4,100,000	\$3,184,707	\$1,737,763	\$378,293	\$352,660	\$1,903,764	46.4%		2,196,236	(166,001)	3,018,706
Aquatic Center-65	\$410,000	\$276,646	\$188,441	\$32,774	\$22,786	\$212,691	51.9%		197,309	(24,250)	252,396
Student Store-68	\$50,000	\$33,225	\$29,454	\$3,099	\$1,301	\$29,772	59.5%		20,228	(317)	32,908
<b>Total</b>	<b>\$148,943,339</b>	<b>\$46,867,180</b>	<b>\$68,487,119</b>	<b>\$9,538,788</b>	<b>\$13,282,022</b>	<b>\$69,978,296</b>	<b>47.0%</b>		<b>78,965,043</b>	<b>(1,491,176)</b>	<b>45,376,003</b>



## Linn-Mar Community School District

### Cash Balances

Fiscal Year: 2024-2025

Date Range: 07/01/2024 - 01/31/2025

Account Number	Title	Beginning Balance	Increases Debits	Decreases Credits	Cash Balance
10.0000.0000.000.0000.101000	CASH IN BANK	0.00	250.00	250.00	0.00
10.0000.0000.000.0000.111001	ISJIT-General Fund	13,410,150.20	18,882,864.74	19,960,920.42	12,332,094.52
10.0001.0000.000.0000.101000	CASH IN BANK	21,500.12	82,964,788.21	81,949,371.40	1,036,916.93
10.0002.0000.000.0000.101000	CASH IN BANK	5,201.98	18.27	0.00	5,220.25
10.0005.0000.000.0000.101000	CASH IN BANK	0.00	50.00	50.00	0.00
21.0000.0000.000.0000.111001	ISJIT - Student Activity	924,741.34	1,250,670.08	924,741.34	1,250,670.08
21.0001.0000.000.0000.101000	CASH IN BANK	0.00	78,852.63	78,852.63	0.00
21.0002.0000.000.0000.101000	CASH IN BANK	72,326.35	2,791,336.09	3,129,346.02	(265,683.58)
21.0004.0000.000.0000.101000	CASH IN BANK	0.00	3,942.81	3,942.81	0.00
22.0000.0000.000.0000.111001	ISJIT - Management	770,617.78	403,236.68	771,366.46	402,488.00
22.0006.0000.000.0000.101000	CASH IN BANK	1,133,619.80	2,942,695.39	3,928,862.77	147,452.42
24.0001.0000.000.0000.101000	CASH IN BANK	0.00	26,107.54	26,107.54	0.00
24.0003.0000.000.0000.101000	CASH IN BANK	191,997.32	211,715.29	218,768.22	184,944.39
33.0003.0000.000.0000.101000	CASH IN BANK	5,331,284.43	14,192,059.30	12,421,589.62	7,101,754.11
35.0003.0000.000.0000.101000	CASH IN BANK	611,705.91	5,441,570.07	5,976,161.96	77,114.02
36.0003.0000.000.0000.101000	CASH IN BANK	6,764,579.40	2,726,233.01	2,532,022.70	6,958,789.71
40.0003.0000.000.0000.101000	CASH IN BANK	532,204.24	7,345,903.59	2,296,427.12	5,581,680.71
61.0000.0000.000.0000.111001	ISJIT - Nutrition	2,568,726.02	71,081.68	0.00	2,639,807.70
61.0001.0000.000.0000.101000	CASH IN BANK	0.00	1,109,841.66	1,109,841.66	0.00
61.0004.0000.000.0000.101000	CASH IN BANK	646,462.70	1,973,569.25	1,934,916.29	685,115.66
65.0001.0000.000.0000.101000	CASH IN BANK	0.00	243,629.61	243,629.61	0.00
65.0002.0000.000.0000.101000	CASH IN BANK	402,746.45	201,254.54	285,591.97	318,409.02
65.0004.0000.000.0000.101000	CASH IN BANK	0.00	17,048.07	17,048.07	0.00
68.0002.0000.000.0000.101000	CASH IN BANK	30,350.76	29,725.15	30,042.52	30,033.39
		33,418,214.80	142,908,443.66	137,839,851.13	38,486,807.33

**End of Report**



# Fundraising Request Form

RECEIVED  
FEB 06 2025

Code: 1005.4-E1

Exhibit 806.1

Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

**REMINDERS:** All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

Building Name: High School Sponsoring Group: HS Athletic Office  
 Contact Name: Tanya Moe Contact Phone: 319-447-3086  
 Contact Email: tmoe@linnmar.k12.ia.us District Account Code: 6900

Description of Fundraising Activity (All information is required for the request to be considered)  
 Fundraising Activity: Pete King Memorial / Linn-Mar Golf Outing  
 Activity Start/End Dates: July 10, 2025 ✓ Estimated Proceeds: \$10,000  
 Purpose/Use of Funds Raised (Must be specific):  
Equipment, uniforms, weight room instructor

**Administrator Approval:**  
 I approve that this request is necessary to provide funds for the purposes described above.  
 Building Administrator's Signature: [Signature] Date: 2/5/25

**Business Office and Board Review/Approval:**  
 Business Office Review/Approval: [Signature] Date: 2/18/25  
 Board Review/Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Summary Due Date: \_\_\_\_\_



RECEIVED

FEB 13 2025

Fundraising Request Form

Exhibit 806.2

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

REMINDERS: All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

**Building Name:** Linn-Mar High School **Sponsoring Group:** LMHS Girls Tennis

**Contact Name:** Bruce Croy **Contact Phone:** 314-521-2185

**Contact Email:** bruce.croy@linnmar.k12.ia.us **District** \_\_\_\_\_

**Account Code:** 6751

---

**Description of Fundraising Activity (All information is required for the request to be considered) Fundraising Activity:** LMHS Girls Tennis Summer Camp **Activity** \_\_\_\_\_

**Start/End Dates:** 6/9/25-6/30/25 ✓ **Estimated Proceeds:** \$6,000

**Purpose/Use of Funds Raised (Must be specific):**

Pay coaches for summer camp work

Buying grips, dampeners and practice materials like ladders for speed/conditioning ✓

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

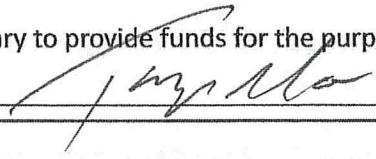
\_\_\_\_\_

RECEIVED

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature: \_\_\_\_\_

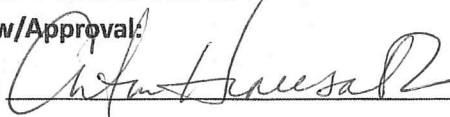


Date: \_\_\_\_\_

2/13/25

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_



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

2/18/25

Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22



Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

REMINDERS: All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

Building Name: HIGH SCHOOL Sponsoring Group: FOOTBALL  
 Contact Name: DUANE ORR Contact Phone: (319) 200-1703  
 Contact Email: dorr@linn.mar.k12.ia.us District  
 Account Code: 21.0109.1900.920.6721.001790

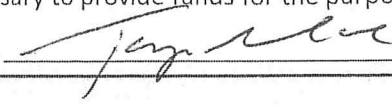
Description of Fundraising Activity (All information is required for the request to be considered) Fundraising Activity: BSN APPAREL STORE Activity  
 Start/End Dates: JUNE 2-6, AUG 4-15 Estimated Proceeds: \$1500  
 Purpose/Use of Funds Raised (Must be specific):  
STIPENDS FOR COACHES, EQUIPMENT NEEDS;  
GUARDIAN CAPS, WRIST COACHES, HEADSET AND COMMUNICATION  
SYSTEM MAINTENANCE, MARKETING AND SOCIAL MEDIA COMMUNICATIONS,  
CLINIC AND PROFESSIONAL DEVELOPMENT FEES, CHARTER BUS EXPENSES,  
SEASON AWARDS BANQUET EXPENSES

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

RECEIVED

Building Administrator's Signature: \_\_\_\_\_

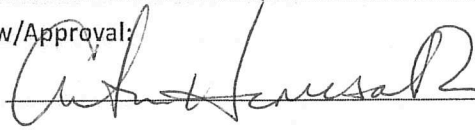


Date: \_\_\_\_\_

2/17/25

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_



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

2/18/25

Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22



# RECEIVED Fundraising Request Form

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Exhibit 806.4

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

**REMINDERS:** All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

Building Name: HIGH SCHOOL Sponsoring Group: FOOTBALL  
 Contact Name: DUANE ORR Contact Phone: (319) 200-1703  
 Contact Email: dorr@linnmar.k12.ia.us District Account Code: 21.0109.1900.920.6721.001790

Description of Fundraising Activity (All information is required for the request to be considered)

Fundraising Activity: YOUTH FOOTBALL CAMP (5<sup>TH</sup> + 6<sup>TH</sup> GRADES)

Activity Start/End Dates: JUNE 16-19 Estimated Proceeds: \$5,000

Purpose/Use of Funds Raised (Must be specific): CAMP T-SHIRTS, STIPENDS FOR COACHES, EQUIPMENT NEEDS; GUARDIAN CAPS, WRIST COACHES, HEADSET AND COMMUNICATION SYSTEM MAINTENANCE, MARKETING AND SOCIAL MEDIA COMMUNICATIONS, CLINIC AND PROFESSIONAL DEVELOPMENT FEES, CHARTER BUS EXPENSES, SEASON AWARDS BANQUET EXPENSES

Administrator Approval: Signature on back

I approve that this request is necessary to provide funds for the purposes described above.

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

Business Office and Board Review/Approval:

Business Office Review/Approval: [Signature] Date: 2/19/25

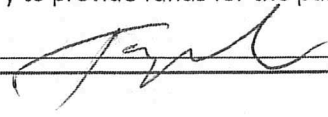
Board Review/Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Summary Due Date: \_\_\_\_\_

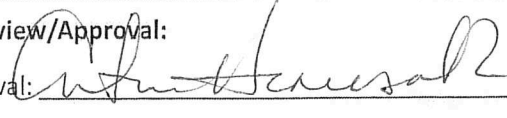
RECEIVED  
20 1 100

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature:  Date: 2/17/25

**Business Office and Board Review/Approval:**

Business Office Review/Approval:  Date: 2/19/25

Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22





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FEB 18 2025

30

Fundraising Request Form

Exhibit 806.5

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

REMINDERS: All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

Building Name: HIGH SCHOOL Sponsoring Group: FOOTBALL  
 Contact Name: DUANE ORR Contact Phone: (319) 200-1703  
 Contact Email: dorrad@linmar.k12.ia.us District  
 Account Code: 21.0109.1900.920.6721.001790

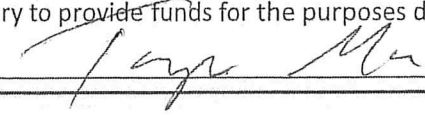
Description of Fundraising Activity (All information is required for the request to be considered) Fundraising Activity: ACE OR LEADING EDGE DISCOUNT CARD Activity  
 Start/End Dates: AUG 4-12 Estimated Proceeds: \$15,000  
 Purpose/Use of Funds Raised (Must be specific):  
STIPENDS FOR COACHES, EQUIPMENT NEEDS;  
GUARDIAN CAPS, WRIST COACHES, HEADSET AND COMMUNICATIONS  
SYSTEM MAINTENANCE, MARKETING AND SOCIAL MEDIA COMMUNICATIONS,  
CIVIL AND PROFESSIONAL DEVELOPMENT FEES, CHARTER BUS EXPENSES,  
- SEASON AWARDS BANQUET EXPENSES.

RECEIVED

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature: \_\_\_\_\_

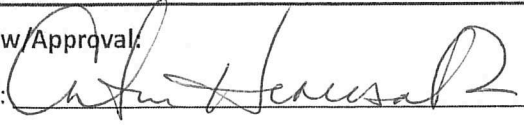


Date: \_\_\_\_\_

2/17/25

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_



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

2/18/25

\_\_\_\_\_ Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22



RECEIVED

FEB 14 2025

Fundraising Request Form

Exhibit 806.6

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Table with 3 columns: Request Form Due, Board Approval Date, Fundraiser Start Date. Rows specify deadlines for fundraisers occurring from October to May, and from June to September.

REMINDERS: All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

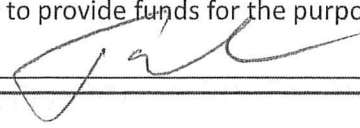
Form fields including: Building Name: Linn-Mar High School, Sponsoring Group: Girl's Soccer & Boys, Contact Name: Hannah Clark, Contact Phone: 319-432-4569, Contact Email: hannah.clark@linnmar.k12.ia.us, District, Account Code: 21-3209-1900-920-6826 & Boys Soccer (6726) 0109, Description of Fundraising Activity: Co-ed Youth Soccer Clinic, Start/End Dates: Sunday, May 4, 2025, Estimated Proceeds: \$5000, split between the two programs, Purpose/Use of Funds Raised: Clinic is being created to connect with younger players, raise awareness & create excitement for our programs. Proceeds will be determined by each head coach based on needs, but will likely be used for travel (charter buses), equipment upgrades/updates (more expensive items such as training goals), replacement of team warm-ups, and to help cover the costs of paying volunteer coaches.

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature: \_\_\_\_\_

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



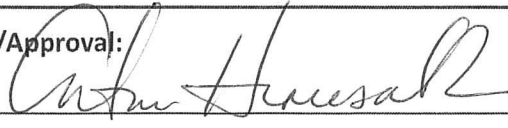
2/14/25

RECEIVED

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_

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



2/18/25

\_\_\_\_\_ Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22



**RECEIVED**  
FEB 14 2025

# Fundraising Request Form

Exhibit 806.7

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

**REMINDERS:** All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

**Building Name:** Linn-Mar High School **Sponsoring Group:** \_\_\_\_\_

Girl's Soccer **Contact Name:** Hannah Clark **Contact Phone:** \_\_\_\_\_

319-432-4569 **Contact Email:** hannah.clark@linnmar.k12.ia.us **District** \_\_\_\_\_

**Account Code:** ~~21-3209-1900-920-6826~~ 0109 ✓

---

**Description of Fundraising Activity** *(All information is required for the request to be considered)* **Fundraising Activity:** \_\_\_\_\_

Team posters with local logos \_\_\_\_\_ **Activity** \_\_\_\_\_

**Start/End Dates:** March 25 - April 1 **Estimated Proceeds:** \$800

**Purpose/Use of Funds Raised** *(Must be specific):*

Money raised will help the women's soccer program to get new soccer

balls, bibs or an needed equipment. We also would like to work towards getting winter jackets for the teams.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

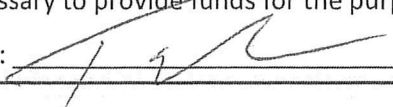
\_\_\_\_\_

RECEIVED

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature: \_\_\_\_\_

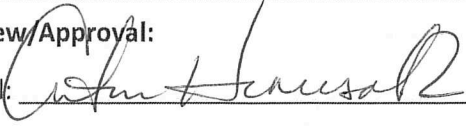


Date: \_\_\_\_\_

2/14/25

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_



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

2/18/25

\_\_\_\_\_ Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22



RECEIVED  
FEB 14 2025

# Fundraising Request Form

Exhibit 806.8

Code: 1005.4-E1

Forms should be submitted to the Business Office per the following deadlines

Request Form Due	Board Approval Date	Fundraiser Start Date
First day of school for fundraisers occurring from October 1 <sup>st</sup> thru December 31 <sup>st</sup>	First meeting in September	Fundraisers should NOT start until the day immediately following board approval
Last day of school before Thanksgiving break for fundraisers occurring from January 1 <sup>st</sup> thru March 31 <sup>st</sup>	December meeting	
By February 15 <sup>th</sup> for fundraisers occurring from April 1 <sup>st</sup> thru May 31 <sup>st</sup>	March meeting	
By April 15 <sup>th</sup> for fundraisers occurring from June 1 <sup>st</sup> thru September 30 <sup>th</sup>	First meeting in May	

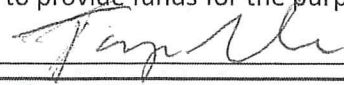
**REMINDERS:** All groups are required to submit a request for each fundraiser to the Business Office specifying how all funds raised will be spent. A Fundraising Project Summary (Refer to Policy 1005.4-E2) is due six weeks after the fundraiser ends. Proceeds should be spent during the year funds are raised.

<b>Building Name:</b> <u>Linn-Mar High School</u> <b>Sponsoring Group:</b>	
<u>Girl's Soccer</u>	<b>Contact Name:</b> <u>Hannah Clark</u> <b>Contact Phone:</b>
<u>319-432-4569</u>	<b>Contact Email:</b> <u>hannah.clark@linnmar.k12.ia.us</u> <b>District</b>
<b>Account Code:</b> <u>21-3209-1900-920-6826</u> <u>0109</u>	
<b>Description of Fundraising Activity</b> <i>(All information is required for the request to be considered)</i> <b>Fundraising Activity:</b>	
<u>Trying to create an online store for parents and players</u> <b>Activity</b>	
<b>Start/End Dates:</b> <u>Mar 1 - 31, 2025</u>	<b>Estimated Proceeds:</b> <u>\$200</u>
<b>Purpose/Use of Funds Raised</b> <i>(Must be specific):</i>	
<u>Money raised will help the women's soccer program to get new soccer balls, bibs or an needed equipment. We also would like to work towards getting winter jackets for the teams.</u>	
_____	
_____	
_____	
_____	

**Administrator Approval:**

I approve that this request is necessary to provide funds for the purposes described above.

Building Administrator's Signature: \_\_\_\_\_



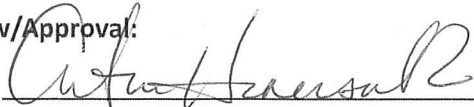
Date: \_\_\_\_\_

2/14/25

RECEIVED  
FEB 14 2025

**Business Office and Board Review/Approval:**

Business Office Review/Approval: \_\_\_\_\_



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

2/18/25

\_\_\_\_\_ Board Review/Approval: \_\_\_\_\_

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

Summary Due Date: \_\_\_\_\_

Revised: 6/22; 7/22





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FEB 20 2025

Code 603.3-R2

ADMINISTRATIVE REGULATIONS REGARDING  
FIELDTRIPS AND EXCURSIONS – **REQUEST FORM**

A written request for overnight trips must be submitted to the building principal not less than four weeks prior to the proposed trip and prior to any travel arrangements being finalized. The request will include: objectives and purposes of the trip; the need, rationale, and justification for an overnight trip; detailed plans for student supervision on the trip; and a complete itinerary and budget of the trip. The school district will be responsible for obtaining a substitute teacher if one is needed. Following fieldtrips and excursions, the teacher shall submit a written summary of the event.

- Overnight trips involving high school students will require the prior approval of a high school administrator and the superintendent, or designee.
- Overnight trips for the middle and elementary school students will require the prior approval of the Board of Directors.

In authorizing fieldtrips, the principal shall consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity and other factors deemed relevant by the superintendent, including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored fieldtrips unless the event is sanctioned by the state athletic associations.

*St. Louis 3/12/25 - 3/15/25*

**Fieldtrip Criteria:**

The following checklist *must be* submitted for overnight trips along with the required documentation:

**Fieldtrip Group:** Linn-Mar Robotics **Submitted by:** Dan Niemitalo  
*(Examples: Robotics, FBLA, etc.)* *(Name)*

Criteria		Description	Yes	No
Purpose	Required	The purpose of the fieldtrip/work site visit is clearly defined and "... is a vital part of the curriculum or current activity." Reference: Board Policy 603.3	✓	
Pre-Planning	Required	There is evidence of pre-planning that will maximize the learning experiences of students on this fieldtrip/work site visit. This should include a prior visit by the teachers in charge. This could include evidence that a conscious decision has been made as to whether this fieldtrip/work site visit or excursion is an initial common experience or a culminating experience.	✓	
Follow-up	Required	There is evidence of planning for follow-up in order to maximize the learning experiences of students on this fieldtrip/work site visit or excursion.	✓	
Assessment	Required	There is evidence that students will be required to demonstrate their understanding of the learning/s expected from this experience.	✓	
Funding	Required	A source of funding has been determined that meets Department of Education and District guidelines. Reference: Board Policy 603.3	✓	
Common Experience	Recommended	This fieldtrip/work site visit is a common experience that all students at this grade level or activity group should have.	✓	
Multi-disciplinary	Recommended	This fieldtrip/work site visit, excursion addresses more than one curricular area and offers the opportunity for curriculum integration.	✓	
School Administrator Approval		<i>Zach Miedorf</i> Date <u>2/11/25</u>		
District Administrator Approval		<i>[Signature]</i> Date <u>2/20/25</u>		
Board Approval		Date		

- Students who are eligible for a fee waiver will be covered through the use of contingency or discretionary funds as appropriate.

Adopted 2/1/99 Reviewed 9/08; 7/11; 9/12; 9/13; 2/15 Revised 10/08; 1/10; 8/16

**Purpose of Field Trip**

Linn-Mar Robotics Mission Statement:

**Empowering students to become technology leaders through experiential learning and mentorship.**

Our team's activities flow from our mission statement. This competition trip meets our goals in a variety of ways.

- Provide students with experiences that are similar in many ways to the business world; that includes communicating in a professional manner with people from other organizations, solving problems on a tight time table, using technical knowledge in a high pressure situation, looking for best practices within other organizations, marketing our team and our "product" to other organizations, and more.
- Practice leadership in a variety of settings within the competitions; that includes leading the scouting effort, leading the drive team, organizing the pits, acting as a safety captain, and more.
- Practice many of the relevant technical and non-technical skills we have been working on in LM Robotics, including troubleshooting, programming, problem solving, communication, and data management.
- Attempt to advance to the FIRST World Championship in April in Houston. Attending this event would be a very inspiring opportunity for all students involved.
- Learn best practices from other teams. Some of the teams that will be in attendance at this event are world class teams with really well organized, highly respected, and historically successful programs.

### **Pre-Planning and Follow-Up**

Every student will be assigned one or more roles prior to the trip. These role descriptions include preparation that is to be done prior to the trip. All of the roles include a follow-up component, such as reporting to the team on best practices learned from other teams.

Roles have been provisionally assigned (attached), but in the coming weeks we will refine these roles as the competition approaches.

### **Assessment**

The trip will be assessed in multiple ways. The competitive success of the team is one such measure; we hope to rank highly enough to be alliance captains, then advance through elimination rounds and win the tournament.

After we return from the event, we will have a significant debriefing meeting with the team. Students in the various roles will discuss their findings, and we will create a list of resulting tasks to be done. This information will create jobs for students to work on in future meetings, and that work will help the team get better at accomplishing our mission.

One of the benefits of this event is that it can inform our future work. We will use what we learn on this trip to direct our FRC team's workload in the coming weeks and months.

### **Funding – Travel**

Travel expenses (\$280 per students) are paid for by students' families. The trip is optional, and we will explore scholarship possibilities if students have a financial need and want to attend.

Projected expenses are as follows:

Hotel Rooms: \$145 x 6 rooms x 3 nights	\$3300
Van rentals (3 vans x 4 days):	\$560
Van gas:	\$220
Group lunch food	\$200
<b>Approximate Total:</b>	<b>\$4300</b>

With adult mentors paying their hotels separately and approximately 10 students attending, this puts the cost per student at \$280 per student. We are also adjusting the costs between this trip and the Cedar Falls trip to put the two trips at a more similar cost to each other (the Cedar Falls trip will cost \$180). Collectively we aim to break even on the two trips. Students will pay for the costs before the trip. Students will also be responsible for bringing money for four supper meals on the road at the competition venue (approximately \$60).

### **Funding – Other Expenses**

The registration fees and parts/tools costs for this event are covered by the LM Robotics general budget.

The robot is already built, but we continue to work on upgraded mechanisms to improve our performance at the event.

LM Robotics' general budget (HS clubs account 21.0109.1900.950.7426) is funded as follows:

- Donations from businesses and non-profit organizations
- Donations from families and mentors
- LM Booster Club support
- Fundraising through summer robotics and Lego camps

### **Common Experience**

The competitions are the most exciting and energizing parts of our endeavors. These competitions motivate students to work very hard and achieve some impressive things. Often when students come back from their very first competition, they come back with a higher level of motivation and go on to become stronger contributors. Also, competitions give them some experiences that they don't get in the shop. For example, they work cooperatively with allies from other schools even as they compete with them (FIRST refers to this highly workplace-relevant dynamic as "coopertition"). They act as ambassadors to introduce spectators to FIRST and its goals and principles. They give their award presentations to judge panels. They work to solve tricky unexpected problems in the very short time available – often just minutes.

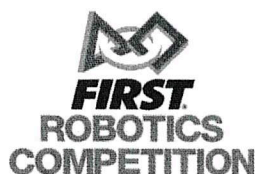
FIRST emphasizes an ethos of Gracious Professionalism at all meetings and events related to FIRST. Students and mentors are expected to behave professionally, but also to relate in a friendly and helpful way to everybody, including competitors. It is common to see one team helping another team at events, even if they know they will face each other in the next match. The goal is for everybody to compete at an increasingly high level. Gracious Professionalism is a standard of behavior that will serve students very well when they become technology leaders.

### **Multi-Disciplinary:**

The students will use and be exposed to many different STEM skills on any robotics trip; those include mechanical design, programming, and electronics. Beyond the many STEM skills, they also put their communication, leadership, and interpersonal skills to the test. The scouting team organizes itself complete a marathon of data collection, and then they have to organize and disseminate that data using a combination of paper, face to face communication, excel, and android app use. The drive team has to assert itself tactfully to advocate for the best strategies for our team and for our entire alliances, even when the alliance partners may sometimes start off with dearly held, yet suboptimal strategic plans. The pit crew must work safely yet quickly and effectively to keep the robot running even when they have only minutes to work. The software team has to keep their cool and maintain their creativity as they tackle vexing bugs that pop up at the least convenient times. Business oriented members of the team will focus partly on scouting other team's organizational and business practices with plans to share ideas with our team later on. All students will be required to frequently practice effective communication with people they don't know.

**2025 St. Louis Regional Trip Itinerary**  
**FIRST Robotics Regional Competition**  
**St. Louis, MO**

<p><b>Wednesday, 03/12/25</b></p> <p>12:00 PM Eat lunch at LMHS  12:25 PM Meet in shop; load up vans  12:45 PM Depart from LMHS  5:30 PM Dinner on the road  6:00 PM Arrive at arena  5 PM - 8 PM Load-in at venue (5 reps)  6:30 PM Check into hotel  7:00 PM Eat dinner near hotel  8:00 PM Swim / prepare scouting / etc  10:30 PM In rooms  11:00 PM Lights out</p> <p><b>Thursday, 03/13/25</b></p> <p>7:30 AM Breakfast at Hotel  8:00 AM Leave Hotel  8:30 AM Arrive at Arena  Registration  Maintenance Pits open  Robot Inspection  9:00 AM Driver's Meeting  11:00 AM Lunch at arena  12:00 PM Practice Matches Begin  6:00 PM Practice Matches End  6:30 PM Pits close, depart for hotel  7:00 PM Supper near hotel  9:00 PM Team meeting  10:30 PM In rooms  11:00 PM Lights Out</p>	<p><b>Friday, 03/14/25</b></p> <p>7:00 AM Breakfast at hotel  7:30 AM Leave hotel  8:00 AM Arrive at Arena  Pits open  8:30 AM Opening Ceremonies  8:50 AM Qualifier Matches begin  12:00 PM Lunch in arena  1:00 PM Matches resume  5:45 PM Awards ceremony, Pits Close  6:15 PM Leave arena, back to hotel  7:00 PM Pizza at hotel  8:00 PM Scouting meetings  10:30 PM In rooms  11:00 PM Lights out</p> <p><b>Saturday, 03/15/25</b></p> <p>6:45 AM Check Out + Breakfast at hotel  7:30 AM Leave hotel  8:00 AM Arrive at arena  Pits open  8:30 AM Opening Ceremonies  8:50 AM Qualifier Matches Resume  12:00 PM Alliance Selections for Finals  12:30 PM Lunch at arena  1:30 PM Playoff Matches &amp; Awards Begin  5:15 PM Approximate end of event, pack up  Depart for home  6:30 PM Supper on the road  11:30 PM Arrive back at LMHS</p>
<p><b>Hotel</b>  Drury Inn  1118 Central Park Dr  O'Fallon, IL  (618) 624-2211</p>	<p><b>Arena</b>  Chaifetz Arena  1 S. Compton Ave  St. Louis, MO</p>
<p><b>Transportation</b>  Travel via rental vans</p>	<p><b>Coach Contact Info</b>  Dan Niemitalo: 319-400-2730</p>



# 2025 REGIONAL SCHEDULE

## ST. LOUIS REGIONAL

### Competition Schedule

<b>Wednesday, March 12</b>	
5:00PM - 8:00PM	5 Team Reps to Load In and Set Up Pits
5:30PM - 7:30PM	Early weight inspection available

<b>Thursday, March 13</b>	
7:45AM	5 Team Reps to Load In
7:45AM	Mezzanine Level Doors Open, must stay on upper level
8:30AM	Pits, Machine Shop, Registration and Inspection Open
8:30AM - 6:00PM	Quiet Room Open (located off the loading dock)
9:00AM	Load-in Ends
9:00AM - 11:00AM	Driver's Meeting, Field Open for Measurement and Calibration
11:00AM - 12:00PM	Lunch
12:00PM - 6:00PM	Practice Matches
6:30PM	Pits and Machine Shop Close

<b>Friday, March 14</b>	
7:45AM	Mezzanine Level Doors Open
8:00AM	Pits and Machine Shop Open
8:00AM - 6:00PM	Quiet Room Open (located off the loading dock)
8:30AM - 8:50AM	Opening Ceremonies
8:50AM - 12:00PM	Qualification Matches
10:00AM - 4:00PM	STEM Pathways Showcase and Student Ambassador Tours
12:00PM - 1:00PM	Lunch
1:00PM - 5:45PM	Qualification Matches
5:45PM - 6:15PM	Awards Ceremony
~6:30PM**	Pits and Machine Shop Close immediately following Awards Ceremony

<b>Saturday, March 15</b>	
7:45AM	Mezzanine Level Doors Open
8:00AM	Pits and Machine Shop Open
8:00AM - 5:00PM	Quiet Room Open (located off the loading dock)
8:30AM - 8:50AM	Opening Ceremonies
8:50AM - 12:00PM	Qualification Matches
10:00AM - 1:30PM	STEM Pathways Showcase and Student Ambassador Tours
~12:00PM - 12:30PM	Alliance Selections (begins 8 minutes after the end of Qualification Matches)
12:30PM - 1:30PM	Lunch
1:30PM - 5:00PM	Playoff Matches & Awards Ceremony
~5:30PM**	Pits close 30 minutes following the close of the Closing Ceremony

\*\*Schedule subject to change. All times are estimated based on flow of rounds.  
See Pit Administration table for updated times.

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FEB 20 2025

Code 603.3-R2



ADMINISTRATIVE REGULATIONS REGARDING  
FIELDTRIPS AND EXCURSIONS – REQUEST FORM

A written request for overnight trips must be submitted to the building principal not less than four weeks prior to the proposed trip and prior to any travel arrangements being finalized. The request will include: objectives and purposes of the trip; the need, rationale, and justification for an overnight trip; detailed plans for student supervision on the trip; and a complete itinerary and budget of the trip. The school district will be responsible for obtaining a substitute teacher if one is needed. Following fieldtrips and excursions, the teacher shall submit a written summary of the event.

- Overnight trips involving high school students will require the prior approval of a high school administrator and the superintendent, or designee.
- Overnight trips for the middle and elementary school students will require the prior approval of the Board of Directors.

In authorizing fieldtrips, the principal shall consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity and other factors deemed relevant by the superintendent, including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored fieldtrips unless the event is sanctioned by the state athletic associations.

**Fieldtrip Criteria:**

Cedar Falls 3/27/25 - 3/29/25

The following checklist *must be* submitted for overnight trips along with the required documentation:

Fieldtrip Group: Linn-Mar Robotics Submitted by: Dan Niemitalo  
(Examples: Robotics, FBLA, etc.) (Name)

Criteria		Description	Yes	No
Purpose	Required	The purpose of the fieldtrip/work site visit is clearly defined and "... is a vital part of the curriculum or current activity." Reference: Board Policy 603.3	✓	
Pre-Planning	Required	There is evidence of pre-planning that will maximize the learning experiences of students on this fieldtrip/work site visit. This should include a prior visit by the teachers in charge. This could include evidence that a conscious decision has been made as to whether this fieldtrip/work site visit or excursion is an initial common experience or a culminating experience.	✓	
Follow-up	Required	There is evidence of planning for follow-up in order to maximize the learning experiences of students on this fieldtrip/work site visit or excursion.	✓	
Assessment	Required	There is evidence that students will be required to demonstrate their understanding of the learning/s expected from this experience.	✓	
Funding	Required	A source of funding has been determined that meets Department of Education and District guidelines. Reference: Board Policy 603.3	✓	
Common Experience	Recommended	This fieldtrip/work site visit is a common experience that all students at this grade level or activity group should have.	✓	
Multi-disciplinary	Recommended	This fieldtrip/work site visit, excursion addresses more than one curricular area and offers the opportunity for curriculum integration.	✓	
School Administrator Approval		<u>Zach M... [Signature]</u> Date <u>2/11/25</u>		
District Administrator Approval		<u>[Signature]</u> Date <u>2/20/25</u>		
Board Approval		Date		

- Students who are eligible for a fee waiver will be covered through the use of contingency or discretionary funds as appropriate.

Adopted 2/1/99 Reviewed 9/08; 7/11; 9/12; 9/13; 2/15 Revised 10/08; 1/10; 8/16



**Purpose of Field Trip**

Linn-Mar Robotics Mission Statement:

**Empowering students to become technology leaders through experiential learning and mentorship.**

Our team's activities flow from our mission statement. This competition trip meets our goals in a variety of ways.

- Provide students with experiences that are similar in many ways to the business world; that includes communicating in a professional manner with people from other organizations, solving problems on a tight time table, using technical knowledge in a high pressure situation, looking for best practices within other organizations, marketing our team and our "product" to other organizations, and more.
- Practice leadership in a variety of settings within the competitions; that includes leading the scouting effort, leading the drive team, organizing the pits, acting as a safety captain, and more.
- Practice many of the relevant technical and non-technical skills we have been working on in LM Robotics, including troubleshooting, programming, problem solving, communication, and data management.
- Attempt to advance to the FIRST World Championship in April in Houston. Attending this event would be a very inspiring opportunity for all students involved.
- Learn best practices from other teams. Some of the teams that will be in attendance at this event are world class teams with really well organized, highly respected, and historically successful programs.

**Overnight Field Trip Request** - Linn-Mar Robotics  
2024 Iowa FRC Regional Competition, Cedar Falls, IA Submitted: 02/11/25

Trip Date: 03/27/25-03/29/25

### **Pre-Planning and Follow-Up**

Every student will be assigned one or more roles prior to the trip. These role descriptions include preparation that is to be done prior to the trip. All of the roles include a follow-up component, such as reporting to the team on best practices learned from other teams.

Roles have been provisionally assigned (attached), but in the coming weeks we will refine these roles as the competition approaches.

### **Assessment**

The trip will be assessed in multiple ways. The competitive success of the team is one such measure; we hope to rank highly enough to be alliance captains, then advance through elimination rounds and win the tournament.

After we return from the event, we will have a significant debriefing meeting with the team. Students in the various roles will discuss their findings, and we will create a list of resulting tasks to be done. This information will create jobs for students to work on in future meetings, and that work will help the team get better at accomplishing our mission.

One of the benefits of this event is that it can inform our future work. We will use what we learn on this trip to direct our FRC team's workload in the coming weeks and months.

This will be our second and final regional competition of the year, and we will be hoping to put on our best performance in front of the LM Robotics students, parents, mentors, and alumni that will be present.

**Overnight Field Trip Request - Linn-Mar Robotics**  
2024 Iowa FRC Regional Competition, Cedar Falls, IA Submitted: 02/11/25

Trip Date: 03/27/25-03/29/25

**Funding – Travel**

Travel expenses are paid for by students’ families. The trip is optional, and we will explore scholarship possibilities if students have a financial need and want to attend.

Projected expenses are as follows:

Hotel Rooms: \$167 x 6 rooms x 2 nights	\$1750
Rental Vans (3 vans x 3 days):	\$630
Van gas:	\$120
Group lunch food	\$350
Parking:	\$30
<b>Approximate Total:</b>	<b>\$2900</b>

With adult mentors paying their hotels separately and approximately 17 students attending, this puts the cost per student at \$180 per student. This price is set jointly with the more expensive St. Louis regional to create two prices that are closer to the middle (St. Louis trip cost is set at \$280). The goal is to break even collectively on the two trips. Students’ families will pay for the costs before the trip. Students will also be responsible for bringing money along for three supper meals on the road and a breakfast meal (concessions) at the competition venue: (approximately \$60). Lunches will be provided as part of the trip cost.

**Funding – Other Expenses**

The registration fees and parts/tools costs for this event are covered by the LM Robotics general budget.

The robot is already built, but we continue to work on upgraded mechanisms to improve our performance at the event.

LM Robotics’ general budget (HS clubs account 21.0109.1900.950.7426) is funded as follows:

- Donations from businesses and non-profit organizations
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- LM Booster Club support
- Fundraising through summer robotics and Lego camps

### **Common Experience**

The competitions are the most exciting and energizing parts of our endeavors. These competitions motivate students to work very hard and achieve some impressive things. Often when students come back from their very first competition, they come back with a higher level of motivation and go on to become stronger contributors. Also, competitions give them some experiences that they don't get in the shop. For example, they work cooperatively with allies from other schools even as they compete with them (FIRST refers to this highly workplace-relevant dynamic as "coopertition"). They act as ambassadors to introduce spectators to FIRST and its goals and principles. They give their award presentations to judge panels. They work to solve tricky unexpected problems in the very short time available – often just minutes.

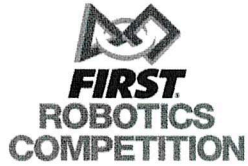
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### **Multi-Disciplinary:**

The students will use and be exposed to many different STEM skills on any robotics trip; those include mechanical design, programming, and electronics. Beyond the many STEM skills, they also put their communication, leadership, and interpersonal skills to the test. The scouting team organizes itself complete a marathon of data collection, and then they have to organize and disseminate that data using a combination of paper, face to face communication, excel, and web application use. The drive team has to assert itself tactfully to advocate for the best strategies for our team and for our entire alliances, even when the alliance partners may sometimes start off with dearly held, yet suboptimal strategic plans. The pit crew must work safely yet quickly and effectively to keep the robot running even when they have only minutes to work. The software team has to keep their cool and maintain their creativity as they tackle vexing bugs that pop up at the least convenient times. Business oriented members of the team will focus partly on scouting other team's organizational and business practices with plans to share ideas with our team later on. All students will be required to frequently practice effective communication with people they don't know.

**2025 Iowa Regional Trip Itinerary**  
**FIRST Robotics Regional Competition**  
**Cedar Falls, IA**

<p><b>Thursday, 03/27/25</b></p> <p>6:00 AM Mentors pick up vans at transportation  6:30 AM Meet at LMHS robotics shop  6:45 AM Depart from LMHS  7:45 AM Load-In, at Arena (5 reps)  8:30 AM Arrive at Arena  Registration  Maintenance Pits open  Robot Inspection</p> <p>9:00 AM Driver's Meeting  11:00 AM Lunch at UNI dining hall  12:00 PM Practice Matches Begin  6:00 PM Practice Matches End  6:30 PM Pits close - depart arena  7:00 PM Supper near hotel  9:00 PM Team meeting  10:30 PM In rooms  11:00 PM Lights Out</p>	<p><b>Friday, 03/28/25</b></p> <p>7:15 AM Breakfast at hotel  7:40 AM Leave hotel  8:00 AM Arrive at Arena  Pits Open  8:30 AM Opening Ceremonies  8:50 AM Qualifier Matches begin  12:00 PM Tailgate Lunch  1:00 PM Matches resume  5:45 PM Awards ceremony, Pits Close  6:15 PM Return to hotel  7:00 PM Pizza at hotel  8:00 PM Scouting meetings  10:30 PM In rooms  11:00 PM Lights out</p> <p><b>Saturday, 03/29/25</b></p> <p>7:00 AM Check Out + Breakfast at hotel  7:40 AM Leave hotel  8:00 AM Arrive at arena  8:30 AM Opening Ceremonies  8:50 AM Qualifier Matches Resume  12:15 AM Alliance Selections for Playoffs  12:30 PM Tailgate Lunch  1:30 PM Playoff Rounds &amp; Awards  5:15 PM Event finishes; pack up, load vans  5:30 PM Supper on the road  7:30 PM Arrive back at LMHS</p>
<p><b>Hotel</b>  Holiday Inn Express  2127 La Porte Road  Waterloo, IA  Telephone: 13192747000</p>	<p><b>Arena</b>  McLeod Center and UNI Dome  2501 Hudson Road  Cedar Falls, IA</p>
<p><b>Transportation</b>  Travel via rental vans</p>	<p><b>Coach Contact Info</b>  Dan Niemitalo: 319-400-2730</p>



# 2025 REGIONAL SCHEDULE

## IOWA REGIONAL

### Competition Schedule

<b>Wednesday, March 26</b>	
6:00PM - 8:00PM	5 Team Reps to Load In, Set Up Pits

<b>Thursday, March 27</b>	
7:45AM	5 Team Reps to Load In
8:30AM	Pits, Machine Shop, Registration and Inspection Open
9:00AM	Load-in Ends
9:00AM - 11:00AM	Driver's Meeting, Field Open for Measurement and Calibration
11:00AM - 12:00PM	Lunch
12:00PM - 6:00PM	Practice Matches
6:30PM	Pits and Machine Shop Close

<b>Friday, March 28</b>	
8:00AM	Pits and Machine Shop Open
8:30AM - 8:50AM	Opening Ceremonies
8:50AM - 12:00PM	Qualification Matches
12:00PM - 1:00PM	Lunch
1:00PM - 5:45PM	Qualification Matches
5:45PM - 6:15PM	Awards Ceremony
~6:30PM**	Pits and Machine Shop Close immediately following Awards Ceremony

<b>Saturday, March 29</b>	
8:00AM	Pits and Machine Shop Open
8:30AM - 8:50AM	Opening Ceremonies
8:50AM - 12:00PM	Qualification Matches
~12:00PM - 12:30PM	Alliance Selections (begins 8 minutes after the end of Qualification Matches)
12:30PM - 1:30PM	Lunch
1:30PM - 5:00PM	Playoff Matches & Awards Ceremony
~5:30PM**	Pits close 30 minutes following the close of the Closing Ceremony

\*\*Schedule subject to change. All times are estimated based on flow of rounds.  
See Pit Administration table for updated times.



**Excursions and Trips Request Form**

**Code 603.3-E**

**RECEIVED**  
**FEB 20 2025**

Date Request Received by CFO/COO: \_\_\_\_\_

A written request for overnight excursions/trips must be submitted to the Chief Financial/Operating Officer **NOT LESS THAN FOUR WEEKS PRIOR TO THE PROPOSED EXCURSION/TRIP AND PRIOR TO ANY TRAVEL ARRANGEMENTS BEING FINALIZED.**

Overnight excursions/trips require prior approval of the building administrator, the superintendent [or designee], and the school board. In authorizing excursions/trips, the building principal will consider the financial condition of the school district, the educational benefit of the activity, the inherent risks or dangers of the activity, and other factors deemed relevant by the superintendent including the participation of the membership of the regular activity group. Students who have graduated may not participate in school sponsored excursions/trips unless the event is sanctioned by the state athletic associations.

**THE REQUEST WILL INCLUDE:**

- a. Rationale for the excursion/trip including the purpose and objectives
  - b. Clarification if request is dependent upon pre-qualifying for event
  - c. Detailed plans for student supervision
  - d. Proposed itinerary
  - e. Cost and source of funding
  - f. Number of student participants
  - g. Copy of required participation paperwork
- Within three weeks of the completion of the excursion/trip the sponsor will submit a written summary of the event to the building principal.
  - The building will be responsible for obtaining a substitute teacher if one is needed.
  - Students eligible for a fee waiver will be covered through contingency/discretionary funds as appropriate.

**EXCURSION/TRIP CRITERIA:** The following checklist **MUST BE** signed and submitted to the Chief Financial/Operating Officer with required documentation **NOT LESS THAN 4 WEEKS PRIOR TO** the proposed excursion/trip and prior to any travel arrangements being finalized:

Group: HOSA Submitted by: Chad Lechner  
 (Examples: Robotics, FBLA, etc.) (Name)

Criteria		Description	Provided
Purpose	<b>Required</b>	Purpose of excursion/trip is clearly defined and ". . . is a vital part of the curriculum or current activity." Reference Board Policy 603.3.	✓
Pre-Planning	<b>Required</b>	Evidence of pre-planning that will maximize the learning experiences of students on this excursion/trip. (Dates, location, number of student participants, plan for supervision, proposed itinerary, hotel, cost/budget source, required participation paperwork, clarification if request is dependent upon pre-qualifying for an event, etc.)	✓
Follow-Up	<b>Required</b>	Evidence of planning for follow-up in order to maximize the learning experiences of students on this excursion/trip.	✓
Assessment	<b>Required</b>	Evidence that students will be required to demonstrate their understanding of the learning expected from this experience.	✓
Funding	<b>Required</b>	Source of funding has been determined that meets Department of Education and district guidelines. Reference Board Policy 603.3.	✓
Common Experience	<i>Recommended</i>	This excursion/trip is a common experience that all students at this grade level or activity group should have.	✓
Multi-disciplinary	<i>Recommended</i>	This excursion/trip addresses more than one curricular area and offers the opportunity for curriculum integration.	✓
Building Principal Approval		<u>Jeffrey M. Smith</u>	Date <u>2-14-25</u>
Chief Financial/Operating Officer Approval		<u>[Signature]</u>	Date <u>2-20-25</u>
Board of Directors Approval			Date

## HOSA State Leadership Excursion Request Form 2025

### **Purpose and Objective**

Attend the Iowa HOSA (Future Health Professionals) State Leadership conference which is attended by multiple students from various schools around the state. Each year, Iowa HOSA holds an annual statewide conference which brings student members together with industry, post-secondary, and community leaders in a competitive showcase that recognizes both technical skill and leadership development. The conference includes competitive events, election of officers, and a recognition ceremony. This year's State Leadership Conference will be held April 6<sup>th</sup>-7<sup>th</sup>, 2025.

Conference site: Drake University in Des Moines, IA

### **Hotel**

Home2 Suites Des Moines at Drake University

2650 University Ave, Des Moines, IA 50311

1-515-264-7960

### **Pre-Qualifying**

Cost for student to attend = \$138.50. Includes conference fee and ¼ of a hotel room.



### **Detailed plans of Supervision**

Ananya Oli is a state HOSA officer and are required to arrive a day early to prepare for the conference. Iowa HOSA will cover the cost of state officer hotel fees. Ananya's parents will provide transportation to Des Moines and she will travel back with Linn-Mar HOSA club at the conclusion of the conference. Supervision of Ananya Oli on April 5<sup>th</sup>-6<sup>th</sup> will be provided by:

**Alisa Drapeaux PhD, DPT, ATC**

**Executive Director**

Iowa HOSA - Future Health Professionals

515-271-1872 | 800-321-HOSA

400 E 14th St | Des Moines, IA 50319

**[iowahosa.org](http://iowahosa.org) | [#IAHOSA](https://twitter.com/IAHOSA)**

**Alternative email: [alisa.drapeaux@drake.edu](mailto:alisa.drapeaux@drake.edu)**

Supervision of Linn-Mar Hosa club members on April 6<sup>th</sup>-7<sup>th</sup> will be provided by:  
Chad Lechner, High School teacher and Hosa club advisor.

[Clechner@linnmar.k12.ia.us](mailto:Clechner@linnmar.k12.ia.us)

O: 319-447-3480 C: 319-573-1951

Supervision will also be provided by parents of Hosa club members TBD

Transportation of members to the conference will be provided by: School bus.

### **Itinerary TBD ( itinerary for the 2024 State Leadership Conference included as a reference)**

#### **Sunday, April 6<sup>th</sup>, 2025**

- 6 AM Depart Linn-Mar High School
- 8 AM Registration opens
- 9 AM Opening Session
- 10 AM Competitive Events – Leadership
- 11 AM Member workshops
- 12 PM Lunch (Drake dining hall – provided in cost of conference)
- 1 PM Competitive Events – Leadership
- 2 PM Advisor Meeting & Professional Learning
- 2 PM Member Workshops
- 4 PM HOSA Bowl
- 6 PM Social – Chapter Time (Meal, students provide own meal money)
- 11 PM Curfew

#### **Monday, April 7<sup>th</sup>, 2025**

- 8 AM Competitive Events - Teamwork
- 9:30 Member Workshops
- 11 AM Exhibitor Booths
- 12 PM Lunch
- 3 PM Closing Awards Ceremony
- 5:45 PM Arrive back at Linn-Mar

**Follow-up**

This will be a team building experience for our local chapter. Individual students competing in events may advance to national and international events.

**Assessment**

They will not be taking a test per say but will have to follow through with duties of the State Officer position.

**Funding**

Iowa HOSA will pay for the lodging and all of meals for Students. Local chapter members will provide conference and hotel fees totaling \$140. This includes conference registration and hotel fee.

**Common Experience**

For students interested in health care professions and leadership experiences. Team building for our local chapter of HOSA.

**Multi-disciplinary**

The leadership skills they learn are transferrable to many facets of their life.