



MISSION STATEMENT  
The mission of the Anamosa Community School District is to provide all students educational opportunities to learn and achieve in a rapidly changing global society

**Anamosa Community School District**  
**Board of Directors**  
**Regular Meeting**  
***High School Library***  
**December 3, 2012 – 7:00 p.m.**

**TENTATIVE AGENDA**

**Exhibit**

1. Call to Order
2. Roll Call and Determination of a Quorum
3. Adoption of Agenda
4. Communication from Individuals & Delegation  
*Recognize Visitors & Community Input*
5. Consent Agenda (Review & Approval)  
*Personnel Appointments & Adjustments*

A

**Architect Presentation - FEH Associates (West Middle School Deconstruction Options)**

**OLD BUSINESS:**

1. Middle School Update
2. Superintendent Search
3. District Vision/Future Facilities Discussion
4. Early Retirement Incentive
5. Financial Advisor Selection

B  
C  
D  
E  
F

**NEW BUSINESS:**

1. Arbitrage Rebate Services
2. District #6b IASB Board Member Election
3. 2013/2014 Modified Allowable Growth Application for Dropout Prevention

G  
H  
I

**REPORTS:**

1. Committee Reports
2. Board Comments
3. Principal Reports
4. Superintendent Report

**Adjourn**

**Important Dates**

December 16, 2012 – Anamosa Middle School Open House - 1:00 -3:00 p.m.

December 17, 2012 – Regular Board Meeting - **5:30 p.m.**

January 26, 2012 – Anamosa Schools Foundation Fundraiser – 6:00 p.m.

*An explanation of board exhibits can be viewed at [www.anamosa.k12.ia.us](http://www.anamosa.k12.ia.us) or requested in their entirety by contacting the Anamosa Community School District Central Office.*

Posted: 11-29-12

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** Personnel Appointments and Adjustments

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**BACKGROUND:**

Routine personnel matters, as outlined in attachment, are recommended for approval.

**THE RECOMMENDATION IS:**

“The Board of Education approve the personnel items as listed.”

PERSONNEL APPOINTMENTS & ADJUSTMENTS – 12/3/12

BLDG. /SUBJECT                      REASON                      EFF. DATE

CERTIFIED STAFF

CLASSIFIED STAFF

Cindy Meyer

Paraeducator – Special Education at AMS  
2 hours per day (hours may increase as  
student time in building increases.)

Open Position

12-4-12

COACHING/EXTRA-CURRICULAR

RESIGNATION

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** New Middle School Update

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

An update on the new middle school will be given.

**THE RECOMMENDATION IS:**

If any action is needed, it will be taken here.

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** Superintendent Search

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

Discussion can continue on the Superintendent Search process.

Following are the qualifications as discussed at the May 7th meeting.

- Demonstrated experience as a Superintendent
- Ability to build collaborative relationships with employees, stakeholders, and groups
- Strong knowledge of school finance
- Experience in collective bargaining as a chief negotiator
- Ability to facilitate the development of a long-term vision for the district
- Knowledge of current education trends and instructional practices
- Ability to facilitate change and garner support for proposed changes
- Involvement in community groups and organizations
- Demonstrated communication and presentation skills
- Proven ability to promote a positive teaching/learning environment
- Ability to provide Instructional Leadership in Curriculum Development

**DISCUSSION ONLY**

**BOARD OF EDUCATION MEETING**  
**December 3, 2012**

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**ISSUE:** District Vision/Future Facilities Discussion

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

Discussion can continue for future District facility construction.

**DISCUSSION ONLY**

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** Early Retirement Incentive

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

The last Retirement Incentive we offered was for employees retiring at the end of the 2009-10 school year. We did not offer one in 2010-11, and we did not have enough people interested in 2011-12.

The teachers are asking for a 3-year incentive plan with options to retire at the end of any of the three years. They also would like a higher benefit than in the past (about twice as much) and to be “qualified” after 12 years in Anamosa. Their proposal is included.

While the cost savings to the General Fund could be true, having a three-year plan really takes away the “incentive” piece. An incentive plan is designed to have employees retire sooner than they might have, therefore saving the District money by replacing with lower-salary employees. There would be no incentive to retire this year if an employee knew they could retire at the end of either of the next two years.

Qualifying with 12 years of employment here seems very short in my experience with incentive plans. 15 years is much more common.

**THE RECOMMENDATION IS:**

Consider the proposals and tax implications of plans proposed and determine if offering an incentive plan will be beneficial to the District this year. I’d further recommend that if a plan is offered, qualification would be after 15 years of employment here and that it be offered for one year only.

Anamosa High School  
209 Sadie Street  
Anamosa, IA 52205  
November 15, 2012

To the Anamosa School Board:

We have come upon a great way to save money for the district, generate early retirement, and reward those who have faithfully served the district. In fact, it has been employed successfully by the Midland School District for the past three years. This is a different take on an Early Retirement Package for certified and full-time staff that requires an employee to be at least 55 years old and have worked at the district for at least 12 years.

Each early retiree would receive half of their current contract salary minus any extra pay such as coaching or the teacher salary supplement and three years of health insurance if they are covered by the district's health plan, up to the amount the district is paying this year. There are three choices on how to receive half the salary: expanding over two or three fiscal years or to leave it in escrow to cover health insurance after the three years of health coverage is up. Classified staff would receive half of their 2012 calendar year salary. This would be offered over three years to maximize the savings of district funds.

Midland has fifteen employees eligible for early retirement this year, so imagine how many more Anamosa School District employees could be eligible and how much money Anamosa could potentially save by offering this package. This would entice employees into early retirement and could save the district badly needed funds.

Attached please find the data that supports the savings that the District would realize under this three year plan. Please consider this package that would benefit loyal employees, the district, and ultimately, the students.

Thank you.

Sincerely,

Dianne La Barge, Sarah Nemmers and Cherie Francik



## **Savings to District from Retiring Teachers**

### **June 2013**

8 teachers on step 13 with a BA36/MA - This is a conservative estimate as most teachers are beyond this level

$\$47,500 \text{ per yr} \times 8 = \$380,000$

Hire 8 teachers on step 1 with BA - Also reduced amount paid to FICA and IPERS

$\$33,400 \text{ per yr} \times 8 = \$267,000$

**Net savings: \$113,000**

### **June 2014**

4 more teachers on step 13 with a BA36/MA

$\$47,500 \times 4 = \$190,000$

Hire 4 teachers on step 1 with BA

$\$33,400 \text{ per yr} \times 4 = \$133,600$

**Net savings: \$56,400 plus \$113,000 from previous year**

**Total savings over 2 years: \$169,400**

### **June 2015**

4 more teachers on step 13 with a BA36/MA

$\$47,500 \times 4 = \$190,000$

Hire 4 teachers on step 1 with BA

$\$33,400 \text{ per yr} \times 4 = \$133,600$

**Net savings: \$56,400 plus \$169,400 from previous 2 years**

**Total savings over 3 years: \$225,800**

### **June 2016**

**Total savings over 3 years: \$225,800 x 2**

**Savings: \$451,600**

### **June 2017**

**Total savings over 4 years: \$451,600 x 2**

**Savings: \$903,200**

**2012-2013 CERTIFIED STAFF**  
**MIDLAND COMMUNITY SCHOOL DISTRICT**  
**EARLY RETIREMENT PROGRAM DESCRIPTION**

The Midland Community School District Early Retirement Program as described in this document has been approved by the District Board of Education. As approved, it applies only to Certified District Employees and is effective only until June 30, 2013. This Early Retirement Program does not vest rights in any District employee whether or not the employee is currently eligible for the Program.

**Purpose**

The Board of Education of the Midland Community School District may deem it appropriate to provide an early retirement incentive to certified employees of extended tenure who opt to retire from the District pursuant to the terms of the Early Retirement Program.

The purpose of this program is to provide the District's employees with the option and opportunity for early retirement from their employment with the District. This Early Retirement Program is designed to show the District's appreciation for the services an employee has rendered to the District and to aid the employee in their transition from public service to retirement.

**Annual Review**

The Board will review the feasibility of this program annually. As part of this review, the Board will make a determination about whether to offer the Early Retirement Program during the then current fiscal year.

If the Board elects to offer the Program, it will review the scope and value of the incentive to be offered. The Board's review and determination may take into consideration the District's financial needs, staffing considerations, student enrollment, and possible contract savings; thereafter, the Midland Community School District may provide its employees an Early Retirement Plan.

**Program Discontinuation**

In the event the Early Retirement Program is altered or discontinued, participants who retired from the District under its provisions will continue to receive the benefits authorized by the Board of Education at the time of the execution by the Board and employee of the Early Retirement Program Agreement.

**EMPLOYEE REQUIREMENTS**

**Determining Eligibility**

An employee is deemed to be eligible for this program when they will have completed at least twelve (12) years of contracted service as an employee with the Midland Community School District by June 30 of the current fiscal year and will have attained at least fifty five (55) years of age on or before June 1 of the current fiscal year.

An employee will be deemed to be in their first year of eligibility during the fiscal year in which they meet both longevity and age criteria for the first time.

However, no employee will be eligible for this Early Retirement Program if:

- a. they are scheduled for layoff or staff reduction;
- b. they have received an official notice of layoff or termination; or
- c. they are subject to termination pursuant to Iowa Code Section 279.15 or 279.27.

### **Qualifying for Program**

An eligible employee qualifies for this program at the end of the current fiscal year (June 30) upon completion of the elements listed. In all cases completion is realized by receipt or certification by the Board Secretary:

- 1) submission by February 1st, of a written application indicating a desire to participate in the Program;
- 2) submission by February 1st, of a written resignation; and
- 3) the Board's acceptance of the employee's written resignation. The Board's acceptance of the employee's written resignation will be considered final action and the employee will be considered terminated after the last day of their current contract term.

## **PROGRAM BENEFITS**

### **Incentive Formula**

The early retirement pay for each eligible certified staff member shall receive as early retirement incentive pay, a cash payment, that is equal to fifty percent (50%) of the employee's 2012-13 salary on the 2012-13 salary schedule, excluding extra duty, extra-curricular, TSS Funds or other payments not included in the salary schedule. Additionally, \$7,400 per year will be paid toward district health insurance for those that currently receiving district health insurance as a paid benefit, for a period of three (3) years. This amount will be paid by the district on a monthly basis. Additional funds needed for coverage will be the responsibility of the retiree.

### **Payment**

The District will pay the incentive amount as follows: one third (1/3) in June, 2013, one third (1/3) in July, 2013 and one third (1/3) in July, 2014; or two thirds (2/3) in July, 2013 and one third (1/3) in July, 2014; whichever method the District deems to be in its best interest. Alternatively if the participant so elects, he or she may have his/her early retirement incentive placed in an Insurance Reserve Escrow Fund from which the District will make health insurance premium payments to continue the employee's group health insurance coverage pursuant to the District's health insurance program.

In the event a Program participant elects to utilize the Insurance Reserve Fund option, the participant will not collect interest on the amount that is placed in the reserve fund; however, the fund will be administered by the District at no cost to the participant. As part of its administration of the fund, the District will continue to pay the participant's health insurance premiums until the participant's contribution to the fund is exhausted, the participant is denied coverage by the insurance carrier, or the participant dies.

### **Health Insurance**

A qualified, eligible Program participant who, during the contract year preceding retirement, is covered by (or a recipient of benefits pursuant to) the District's Health Insurance plan may elect to continue coverage at the District's group rate by paying the monthly premium in full to the District's business office prior to the date the District's premium payment is made to the insurance carrier. An Early Retirement Program participant will be eligible to continue participation in the District's group health insurance plan as long as they pay the premium in full when it is due and are permitted to continue coverage by the insurer.

Nothing herein shall limit the District's ability to change the terms of its existing health insurance plan. This plan in no way guarantees that an employee will be provided any certain level of benefits or premiums during the time of the employee's participation in this plan.

### **Change in Status of Program Participants**

If the participant dies before having been paid the full amount of their Early Retirement Program incentive or their contribution to the Insurance Reserve Fund is exhausted, or if the participant is denied insurance coverage after electing to have their early retirement pay placed into the Insurance Reserve Fund, the remaining amount of the participant's early retirement incentive will be paid to the participant, or if the participant is deceased, the participant's beneficiary, if named, or to the participant's estate.

### **Employee Rights**

The adoption of an Early Retirement Program for any one fiscal year shall not vest any rights in any employee whether or not the employee is currently eligible for early retirement.

### **Status of Participants**

An employee who elects to participate in the District's Early Retirement Program will become a retired employee and will be entitled to all rights and privileges of same under applicable law and the policies of the Midland Community School District Board of Education.

However, Early Retirement Program participants shall not be eligible to be rehired in any capacity with the Midland Community School District other than defined below:

Midland Community School District be required to consider an application for employment from an Early Retirement Program participant; provided however, that, at the sole discretion of the Board of Education, the District may employ Early Retirement Program participants as temporary substitute employees, Schedule B supervisors, and part time positions, as deemed necessary by the Board. It is each retired employees responsibility to monitor their IPERS, in regard to any employment thereafter early retirement has been accepted.

Each employee who elects to participate in the District's Early Retirement Program must specifically agree to hold the District harmless and indemnify it if the participant attempts to submit an employment application or otherwise attempts to be re-employed with the District.

**2012-2013 CLASSIFIED STAFF**  
**MIDLAND COMMUNITY SCHOOL DISTRICT**  
**EARLY RETIREMENT PROGRAM DESCRIPTION**

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**Purpose**

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The purpose of this program is to provide the District's employees with the option and opportunity for early retirement from their employment with the District. This Early Retirement Program is designed to show the District's appreciation for the services an employee has rendered to the District and to aid the employee in their transition from public service to retirement.

**Annual Review**

The Board will review the feasibility of this program annually. As part of this review, the Board will make a determination about whether to offer the Early Retirement Program during the then current fiscal year.

If the Board elects to offer the Program, it will review the scope and value of the incentive to be offered. The Board's review and determination may take into consideration the District's financial needs, staffing considerations, student enrollment, and possible contract savings; thereafter, the Midland Community School District may provide its employees an Early Retirement Plan.

**Program Discontinuation**

In the event the Early Retirement Program is altered or discontinued, participants who retired from the District under its provisions will continue to receive the benefits authorized by the Board of Education at the time of the execution by the Board and employee of the Early Retirement Program Agreement.

**EMPLOYEE REQUIREMENTS**

**Determining Eligibility**

An employee is deemed to be eligible for this program when they will have completed at least twelve (12) years of contracted service as an employee with the Midland Community School District by June 30 of the current fiscal year and will have attained at least fifty five (55) years of age on or before June 1 of the current fiscal year.

An employee will be deemed to be in their first year of eligibility during the fiscal year in which they meet both longevity and age criteria for the first time.

However, no employee will be eligible for this Early Retirement Program if:

- a. they are scheduled for layoff or staff reduction;
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An eligible employee qualifies for this program at the end of the current fiscal year (June 30) upon completion of the elements listed. In all cases completion is realized by receipt or certification by the Board Secretary:

- 1) submission by February 1st, of a written application indicating a desire to participate in the Program;
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## **PROGRAM BENEFITS**

### **Incentive Formula**

The early retirement pay for each eligible classified staff member, shall be calculated based on the 2012 calendar year wages, and shall be fifty percent (50%) of the employee's 2012 calendar year wages excluding any coaching or schedule B duties. Additionally, \$7,400 per year will be paid toward district health insurance for those that are currently receiving district health insurance as a paid benefit, for a period of three (3) years. This amount will be paid by the district on a monthly basis. Additional funds needed for coverage will be the responsibility of the retiree.

### **Payment**

The District will pay the incentive amount as follows: one third (1/3) in June, 2013, one third (1/3) in July, 2013 and one third (1/3) in July, 2014; or two thirds (2/3) in July, 2013 and one third (1/3) in July, 2014; or two third (2/3) in the month following their retirement date and one thirds (1/3) in July, 2014 and whichever method the District deems to be in its best interest. Alternatively if the participant so elects, he or she may have his/her early retirement incentive placed in an Insurance Reserve Escrow Fund from which the District will make health insurance premium payments to continue the employee's group health insurance coverage pursuant to the District's health insurance program.

In the event a Program participant elects to utilize the Insurance Reserve Fund option, the participant will not collect interest on the amount that is placed in the reserve fund; however, the fund will be administered by the District at no cost to the participant. As part of its administration of the fund, the District will continue to pay the participant's health insurance premiums until the participant's contribution to the fund is exhausted, the participant is denied coverage by the insurance carrier, or the participant dies.

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Nothing herein shall limit the District's ability to change the terms of its existing health insurance plan. This policy in no way guarantees that an employee will be provided any certain level of benefits or premiums during the time of the employee's participation in this plan.

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Midland Community School District be required to consider an application for employment from an Early Retirement Program participant; provided however, that, at the sole discretion of the Board of Education, the District may employ Early Retirement Program participants as temporary substitute employees, Schedule B supervisors, and part time positions, as deemed necessary by the Board. It is each retired employees responsibility to monitor their IPERS, in regard to any employment thereafter early retirement has been accepted.

Each employee who elects to participate in the District's Early Retirement Program must specifically agree to hold the District harmless and indemnify it if the participant attempts to submit an employment application or otherwise attempts to be re-employed with the District.

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** Financial Advisor Selection

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

Compare the costs as proposed by the three financial advisors and select one to work with us on the upcoming projects.

**THE RECOMMENDATION IS:**



**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** Arbitrage Rebate Services

**CONTACT:** Linda Von Behren, Business Manager

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**BACKGROUND:**

The seven different series of Qualified School Construction Bonds each require arbitrage rebate analysis.

An engagement letter from Berens-Tate Consulting Group is attached for your review.

Beth Grob of Ahlers Law Firm, the District's bond counsel, referred the District to Berens-Tate Consulting Group to provide these services. I have attached correspondence from Beth that describes these services and why their firm refers all of their clients to Berens-Tate.

**SUPERINTENDENT'S RECOMMENDATION IS:**

"to approve the engagement letter with Berens-Tate Consulting Group for arbitrage rebate calculation services".

**BERENS-TATE CONSULTING GROUP**  
SPECIALIZING IN TAX-EXEMPT BOND SERVICES

November 15, 2012

Linda Von Behren  
Anamosa Community School District  
200 South Garnavillo Street  
Anamosa, IA 52205

Dear Ms. Behren:

Thank you for the opportunity to provide arbitrage rebate services to Anamosa Community School District ("District"). This letter outlines my understanding of the project.

**SCOPE**

We will perform an arbitrage rebate analysis under Internal Revenue Code Section 54A for the following Taxable School Infrastructure Sales and Services Tax Revenue Bonds (Qualified School Construction Bonds):

<b><u>Bond Issue</u></b>	<b><u>Expenditure Analysis Date*</u></b>	<b><u>Rebate Calculation Date</u></b>
\$1,500,000 Series 2010A	December 28, 2013	November 30, 2015
\$1,300,000 Series 2010B	December 28, 2013	November 30, 2015
\$1,000,000 Series 2010C	December 28, 2013	November 30, 2015
\$1,000,000 Series 2011A	April 15, 2014	March 31, 2016
\$4,200,000 Series 2011B	June 9, 2014	May 31, 2016
\$2,000,000 Series 2011C	July 13, 2014	June 30, 2016
\$1,600,000 Series 2012A	May 15, 2015	April 30, 2017

\* The Expenditure Analysis will occur the sooner of when project monies are fully expended or the third bond year-end.

**PROCEDURES**

We will perform the following procedures:

- Review of bond documentation (official statement, arbitrage certificate, investment information, IRS Form 8038-G, etc.).
- The available project proceeds are required be spent for one or more qualified purposes within the 3-year period beginning on the issuance date of the bonds. We will review the expenditure analysis prepared by the District to determine if this requirement was met at the third bond year-end.

- Analyze the Reserve Fund (i.e. sinking fund) to determine if the following tests were met at the fifth bond year-end:
  1. Such fund is funded at a rate not more rapid than equal annual installments.
  2. Such fund is funded in a manner reasonably expected to result in an amount not greater than an amount necessary to repay the issue.
  3. The yield on such fund is not greater than the allowable discount rate published by the Bureau of Public Debt.

Work closely with bond counsel to recommend an action plan if the 3-year expenditure test or Special Rule for Reserve Funds is not met.

### **REPORTS**

We will prepare the following reports:

- Summary report - describes procedures performed and the related findings.
- Spend-down report – documents our review of the expenditure analysis prepared by District to determine if the 3-year expenditure test was met.
- Yield restriction report - includes details of all transactions, sources of information, assumptions, and the yield calculation on the Reserve Fund.

### **DISTRICT'S RESPONSIBILITIES**

The District is responsible for providing the Consulting Group with the documentation necessary to complete the analyses. This would include bond documentation (official statement, arbitrage certificate, 8038, etc.), as well as expenditure and investment information (trust statements/activity summary by fund, investment summary, disposition of bond proceeds, etc.) for the project and reserve funds. In completing our analyses we will rely on the information provided by you without independent verification. We will retain copies of the records you have supplied us, along with our work papers for your engagement. However, our work papers and files are not a substitute for the original records of the District.

### **FEES**

We estimate our fees for each bond will be \$1,500 for the spend-down report and \$3,000 for the yield restriction report, plus actual out-of-pocket expenses (travel, delivery charges, etc.). This fee is dependent on the availability, quality, and completeness of the records noted above and will be due within 30 days of completion of the project. If unexpected problems arise which are beyond the scope of our work and would affect our fee quote we would discuss these with you and obtain the necessary authorization from you before performing any additional procedures.

We look forward to working with the Anamosa Community School District on this project and appreciate this opportunity to serve you.

Sincerely,

BERENS-TATE CONSULTING GROUP

A handwritten signature in cursive script that reads "Chris D. Berens".

Chris D. Berens

If you agree with the services outlined in this letter, please sign in the space provided below and return a copy to me.

Accepted by: \_\_\_\_\_

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

Beth Grob 8:35 AM (7 minutes ago)

to me

Hi Linda. A rebate specialist is a very niche, limited service. We refer all our clients to Berens-Tate who need rebate work. Berens has an excellent, national reputation for this type of work. There is no one in Iowa who performs these services and any other firm would be out of New York, Boston, Chicago, LA, or some other major city and will charge a great deal more for their services. Also, Chris is much more "hands-on" – if you have a question, you can call him and he answers your questions. We haven't had such luck with other, larger, out-of-state firms. Berens-Tate's fees are VERY reasonable, compared to other firms, and they perform this specialized service for several clients here in Iowa, such as the Iowa Board of Regents, the State of Iowa, City of Des Moines, Mason City CSD, etc.

The rationale for approving the engagement is that when issuing the QSCB's, the District made several promises regarding calculations that would be made regarding the expenditure of and investment of Bond proceeds. Berens will perform these services for you. Also, QSCB's have been on the IRS's work plan for random audits and they do ask about these calculations. In 2012, 2 Iowa school districts who issued QSCB's were audited.

Hopefully this gets you the information you need. If you need anything further, need clarification, or I can be of further assistance, let me know. THANKS! Beth

Elizabeth A. Grob, Esq.

Ahlers & Cooney, P.C.

100 Court Avenue

Suite 600

Des Moines, Iowa 50309

Direct Dial: (515) 246-0305

Fax: (515) 243-2149

Email: [bgrob@ahlerslaw.com](mailto:bgrob@ahlerslaw.com)

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** District #6b IASB Board Member Election

**CONTACT:** Brian Ney, Superintendent

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**BACKGROUND:**

During the IASB District Caucus held at the Delegate Assembly on Wednesday, November 14, 2012, the following person(s) was nominated for a one-year term on the IASB Board of Directors commencing January, 2013:

- David Law, Marion Independent Schools

A copy of the official ballot for our district is attached.

**THE RECOMMENDATION IS:**

Approve the above candidate for one-year term on IASB Board of Directors.

Weighting 2

**Iowa Association of School Boards**

***Official Ballot***

**Vote for One**

November 19, 2012

**District #6a** IASB Board Member – To Fill an Expired One-Year Term Ending January 2014

David Law, Marion Independent Schools

***Please Note:***

***The ballot must be returned in the ballot envelope and postmarked no later than Wednesday, December 19, 2012***

**Please Do Not Sign This Ballot**

**BOARD OF EDUCATION MEETING  
December 3, 2012**

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**ISSUE:** 2013/2014 Modified Allowable Growth Application for Dropout Prevention

**CONTACT:** Linda Von Behren, Business Manager

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**BACKGROUND:**

The request for Modified Allowable Growth is for additional authority for 2013-2014 for returning dropouts and dropout prevention programs. These programs support K-12 services for at-risk students to improve school performance.

The Budget Proposal and MAG Request is attached for your review. At the time of the writing of this exhibit, the DE has not opened the budget line item for Tuition. If this line item is not opened by the DE, the amount of the request will be decreased automatically by \$25,270 to \$173,623.

The SBRC will take official action on requests at its January meeting. If approved, additional authority is granted for the 2013-2014 school year. The board will have the opportunity to approve the actual amount levied to support these programs at the time the budget is certified in April 2013.

This year, the District is primarily using carryover drop-out prevention funds to support At-Risk programs with a property tax levy of \$10,933

**SUPERINTENDENT'S RECOMMENDATION IS:**

“to approve the 2013-2014 Modified Allowable Growth request for Dropout Prevention in the amount of \$198,893.”





# Iowa Department of Education



SELECT Proposed Growth School Year: 2013-2014 <input type="button" value="Go"/>	SELECT Form: 04, Budget Proposal and MAG Request <input type="button" value="Go"/> <input type="button" value="Exit"/>
Report Results for 2011-2012 on form Programs, Results and PD	District: 0234 School: 0000 Name: Anamosa Comm School District
Current Application Open: Dropout Prevention/Mod Allow Growth	

Iowa Department of Education  
Bureau of School Improvement

## 2013-2014 Modified Allowable Growth Application for Dropout Prevention Budget Proposal and MAG Request

District Application and Initial Certification Due December 15, 2012  
State Approval Due January 15, 2013  
State Certification Completed after SBRC Approval

You must click SAVE/UPDATE to save changes... the GO, HELP, and EXIT buttons do NOT save changes!

Click the following links to see: [Financial/Accounting Help](#), [Uniform Administrative Procedures](#), [School Districts](#)

Click the following link for Help specific to the [Budget Proposal and MAG Request](#) web form.  
Upon clicking the above HELP link, a new web page opens up in a new browser window. The current web browser window will remain open.

**Budget Proposal for Schools, Programs and Support Services for Returning Dropouts and Dropout Prevention**  
Dropout Prevention funds cannot be comingled with other general education or used as a match for federal funds. Therefore, districts must use the proper program (420), project (1119) and codes when accounting for dropout prevention budgets.  
NOTE: Preschool services are NOT eligible for support under Iowa Code Section 257.38-41  
The program form will only allow whole dollars.

Starting with the 2013 application year, the State must be contacted to allow district access to some of the budget line items. Indicators are shown above the budget line item w is a requirement. The State has access regardless of district access settings.

BUDGET ITEM	OBJECT CODE	Description	Amount	
1.	121-129	Certified Staff Salaries	\$177,886	
2.	130-139	Other Professional Salaries	\$18,227	
3.	100-109	Paraprofessional Salaries	\$0	
4.	111-119	Administrative Salaries (separate school only) By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <a href="#">MAG Dropout Prevention</a> . NO - the district does not have access to this budget line item.	\$0	
				Administrative Sa Current character c  Maximum number of : allowed, including sp punctuation: 5
5.	150-159	Office/Clerical Salaries By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <a href="#">MAG Dropout Prevention</a> . NO - the district does not have access to this budget line item.	\$0	
				Office/Clerical Sa Current character c  Maximum number of : allowed, including sp punctuation: 5
6.	170-179	Salaries Paid to Operative Employees By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <a href="#">MAG Dropout Prevention</a> . YES - the district has access to this budget line item.	\$1,786	
				Salaries Paid to Op Employees Current character cc  Maximum number of : allowed, including sp punctuation: 5

FTE  
4.1  
.5  
0

0

.1

This is for bus driver wages to transport students to the Summer Reading Academy. This Academy is held in July for 2nd grade students not reading at grade level.			
7.	210-249, 270-275	Employee Benefits	\$32,354
8.	310-329	Purchased Administrative and Educational Services By entering an amount in the box to the right, a written justification is required below.	\$0
		Purchased Administrative and Educational Services Current character c Maximum number of allowed, including sp punctuation: 5	
9.	330-339, 59x	Dropout Prevention - Professional Development If an amount greater than 0 is entered please complete the Proposed Staff Development section of form 03, Programs, Results and PD for 2014.	\$0
10.	347, 349	Other Purchased Professional Services By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0
		Other Purchased Professional Services Current character c Maximum number of allowed, including sp punctuation: 5	
11.	431, 433	Equipment, Technology Repair Services By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0
		Equipment, Technology Services Current character c Maximum number of allowed, including sp punctuation: 5	
12.	511-519, 581, 589, 590, 599	Tuition, Travel, Shared Contracts By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0 33,693
Includes tuition paid for alternative high school for students at risk for dropping out		Tuition, Travel, Shared Contracts Current character c Maximum number of allowed, including sp punctuation: 5	
13.	610-619, 626, 627, 641-669	Books, Periodicals, Supplies By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . YES - the district has access to this budget line item.	\$1,245
This includes reading curriculum for secondary at-risk students as well as fuel for transporting summer reading academy students.		Books, Periodicals, Supplies Current character c Maximum number of allowed, including sp punctuation: 5	
14.	734, 739	Property (Equipment) By entering an amount in the box to the right, a written justification is required below.  To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0
		Property (Equipment) Current character c Maximum number of allowed, including sp punctuation: 5	

15.	810-819	<b>Dues, Fees</b> By entering an amount in the box to the right, a written justification is required below. To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0
			Dues, Fees Current character ( ) Maximum number of ( ) allowed, including spaces and punctuation: 5
16.	891-899	<b>Miscellaneous Expenses</b> By entering an amount in the box to the right, then a written justification is required below. To request district access to this budget line item, please email <u>MAG Dropout Prevention</u> . NO - the district does not have access to this budget line item.	\$0
			Miscellaneous Ex Current character ( ) Maximum number of ( ) allowed, including spaces and punctuation: 5
17.		<b>Total</b>	<b>\$231,498</b>

265,191

**District-Wide/Building-Wide Dropout Prevention Programming** (Universal Supports)  
Iowa Code section 287.41(1)(d)  
Up to five percent of the total budgeted amount received pursuant to subsection 1 may be used for purposes of providing district-wide or building-wide returning dropout and dropout prevention programming targeted to students who are not deemed at risk of dropping out.

Will the district use 5% (\$11,574.90) of the total budget amount (\$231,498) for district-wide or building-wide returning dropout and dropout prevention programming targeted to students who are not deemed at risk of dropping out?  
 Yes  No

If YES, Please list the number (#) and type (position/function) of staff to be utilized. Include a brief program description stating how this program is dropout prevention programming and is in addition to the core educational program and the targeted audience to be served:

The maximum number of characters allowed, including spaces and punctuation, is 1,000.  
The current character count is 0.

**Modified Allowable Growth Request Calculation**  
NOTE: Each school district accessing modified allowable growth for services for returning dropouts and dropout prevention under Iowa Code Section 257.38-.41 must independently submit a budget request even if programs have been linked and sharing is occurring among districts.  
The program form will only allow whole dollars.

MAG ITEM	Description	Amount	Calculation
1.	Total budget figure from Budget Proposal section, above	265,191	\$231,498
2.	Carry forward from previous project 1119 should be entered here		\$0
3.	Total budget less than other sources (subtract line 2 from line 1)	265,191	\$231,498
4.	Minimum (25%) that must come from the regular district program cost (25 percent or more of line 3)	166,298	\$57,875
5.	Budget Balance (subtract line 4 from line 3)		\$173,623
6.	District cost per pupil		\$6,018
7.	Certified Enrollment for October 2012. Certified Enrollment for 2012-2013, for which the data is used in the Oct. 2012 Summary, was found and certified on 10/8/2012 8:10:05 AM.		1,238.1
8.	Maximum modified allowable growth possible (3.2% x line 6 x line 7)		\$238,428
9.	Amount on line 5 or 8, whichever is lesser		\$173,623
* 10.	Modified Allowable Growth request Enter an amount greater than zero and equal to or less than: \$173,623	198,893	\$173,623

198,893

198,893

\* Enter the amount on line 10, on your district's Aid and Levy Worksheet after the amount of modified allowable growth is approved by the School Budget Review Committee (SBRC).

<b>State Reader's Dialogue with District and Approval Process for the <i>Budget Proposal and MAG Request Form</i></b> <b>Reader's Dialogue Last Modified by State: Reader Indicators Not Yet Modified</b>	
This section is completed by the State after the district certifies MAG/DoP. Following is the State's feedback to the district regarding the <i>Budget Proposal and MAG Request</i> form and what to do if all or part of the form is not approved by the State Reader.	
<b>Is the Budget Proposal and MAG Request form approved by the State Reader?</b>	No approval status at this time.
<b>Items for review:</b>	
<b>State Reader's dialogue with district:</b>	No dialogue at this time.

For questions regarding this form, please contact:  
 Email: [MAG Dropout Prevention](mailto:MAG_Dropout_Prevention), Phone: 515-281-5715  
 Bureau of School Improvement

## **Board of Education Committees**

Policy Committee	Kristine Kilburg, Rich Crump, Kandi Behnke
Negotiations Committee	Kristine Kilburg, Anna Mary Riniker, Kandi Behnke
PPEL & Facilities Committee	Connie McKean, Rich Crump, Anna Mary Riniker
CADRE	Shaun Lambertsen, Rich Crump, Connie McKean
Jones Co. Conf. Bd.	Lowell Tiedt
IASB Delegate Assembly Representative	Connie McKean
Ad Hoc Building/Long Range Planning	Kristine Kilburg, Lowell Tiedt, Shawn Lambertsen