First Quarter Newsletter 2017-2018

IASBO Mission Statement:
The mission of the Iowa Association of School Business Officials is to provide programs and services that provide the highest standards of school business management practices and professional growth.

A Message from the President. . .

Wow!! Where did our summer go? I hope everyone was able to get away and enjoy time away from your office to do things that are fun; you enjoy, and help you relax. Whether it was working on a project around your home or traveling somewhere special, we all need that time away to reenergize and refocus. Today, as I am writing this message, my District is welcoming all of our new teachers for the 2017-2018 school year. It is the first day of their contract and everyone is smiling and eager to get started. I hope all of you feel the same way and are smiling and eager to get the school year started.

I am truly honored and humbled to serve as the IASBO President for the 2017-2018 year. I hope to continue the tradition of leadership set by many of our IASBO past presidents. To serve as President this year is definitely outside my comfort zone, but I am smiling and eager to get started. If I can do this, so can many of you. If you have not previously served in some capacity on an IASBO committee, please consider it. Who knows, you may develop a new friendship along the way.

Speaking of new friendships, I would especially like to thank Melissa Fettkether for her leadership and work serving as President last year. Melissa is a strong leader and a great person. During this past year, I have gotten to know Melissa much more than just as another school business official as we traveled together to ASBO International conferences and IASBO Board meetings. I have gotten Melissa to start trying triple “D” (Diners, Drive-Ins and Dives) locations. This is one of my favorite things to do with my family while traveling to other cities.

The IASBO Professional Leadership Conference was held in Ames on June 6, 2017. Members from the current IASBO board, regional directors, professional growth committee, past-presidents, and Jim and Nancy attended. The group was asked to make recommendations to the IASBO Board on 2017-2018 goals for the strategic plan and to provide input on the levels of engagement for
our organization. The IASBO Board will take the feedback provided and determine the 2017-2018 goals. IASBO is a great organization because of each of you. Thank you for being a member of IASBO and thank you for all you do for the students, staffs and schools of Iowa. I hope you have a good 2017-2018 school year and are smiling and eager to get started.

Kevin Kelleher
IASBO President 2017-2018
The IASBO Fall Conference will be held at Prairie Meadows Conference Center October 31 and November 1. School Business Officials are encouraged to invite the HR people in your district to attend at a special one day rate. The first day of the conference sessions includes topics of interest to Human Resource personnel.

IASBO Titanium level Corporate Partners will have information tables.

*American Fidelity – Horace Mann – VOYA – Forecast 5*

**Tuesday, October 31**

Opening General Sessions begin at 8:30 and will include:

- “Be Your Own Superhero”, Sam Glenn, Keynote speaker.
- There’s A Pony in There Somewhere – Dr. James Scharff

Afternoon breakout sessions include:

1:00 – 2:00

- Recruiting/Advertising/Orientation/Welcome – Mike Cyze, Dubuque CSD – Where to find applicants, how to use social media, EEOC staffing and diversity, orientation/welcome best practices
- Worker Comp Changes – Nolan Grimm & Janelle Friedman, Jester Insurance – Pre-employment physical program, return to work program
- 403b Changes – Jenny Sandusky – Update on 403b program, additional vendors, plan with ease overview, 457 options
- Under Lock and Key – Handling Confidential Records – Kristy Latta, Ahlers – Personnel Files, Medical Files, what is confidential, what is public information

2:15 – 3:15

- Board Policy Workshop #3 – Kristy Latta, Ahlers - 400 Series (Chapter 20 changes)
- Dillon’s Rule vs Home Rule – Danielle Haindfield, Ahlers and Shawn Snyder, IASB – History of Home Rule and Dillon’s Rule, how we arrived here and moving forward.
- FMLA – Miriam Van Heukelem, Ahlers – Review of Family Medical Leave Act rules and regulations
- Employee Handbooks – Jeff Krausman, Dickinson Law Firm – Basic guidance on do’s and don’ts, what should be in and what should be out.
3:30 – 4:30

- Section 125 Compliance – American Fidelity – Compliance/Introducing a QHDHP with HAS bank accounts
- Behavioral Finance – Richard Mason, Voya - education for schools on how to improve participant outcomes when planning for retirement. This session includes how behavioral studies can be applied to encourage better retirement savings habits.
- Forecast5 Session – Gary Sinclair
- Robert’s Rules of Order – This session will provide assistance with parliamentary procedure

4:30 – 5:30 – Service Project

7:00 – 10:00 – Johnny Holm Band with Halloween Costume Contest

Wednesday, November 1

IASBO Gold level Corporate Partners will have information tables
National Insurance - Software Unlmtd – Jester – AXA - Miles Capital - Piper Jaffray - Teachers on Call

General Sessions begin at 8:30 and will include:

- DE Update – Fall 2017
- A Promise of Iowa – Lisa Bartusek, IASB – Telling the story of the good things that happen every day and the difference public schools make to individual students

Breakout Sessions

SBO Initial Authorization Training – 12:45 – 4:45

12:45 – 1:45

- DE Coding Guidance – Denise Ragias, DE – Understanding coding – what goes together and what doesn’t - categoricals
- A Promise of Iowa – Digging Deeper – Lisa Bartusek, IASB
- E-Rate – Pam Jacobs - what it is, how it is funded, how it applies to public schools
- Google – Jessica Fincel – Google hands on training

2:00 – 3:00

- Comprehensive Calendar – Jeff Swartzentruber, Mid Prairie CSD – This is a comprehensive roadmap in the form of an Excel Spreadsheet listing significant tasks and steps for the year
- Segregation of Duties – Steve Graham Cedar Rapids CSD – SBO office organization and delegation of duties
- Digital Documentation – Ed Chabal, Mt. Pleasant CSD – How saving documents and information in a digital format works at Mt Pleasant CSD
- Google – Jessica Fincel – Google hands on training
3:15 – 4:15

- Open Enrollment – Eric Heitz and Carla Schimelfennig, DE – Open Enrollment and Concurrent Enrollment – Open Enrollment In and Out – mid year changes – Rules – Associated Funding
- Nutrition Update – Ann Feilmann, DE – Nutrition Update, USDA requirements, Procurement review tool
- Professional Development for Classified Staff – Lora Appenzeller-Miller, Waukee CSD – Basics on how to start a Professional Development program for administration and operational staff
- Google – Jessica Fincel – Google hands on training

Choose a partner who knows Iowa PK-12 education finance

For your next financing, Realize the Power of Partnership™

**Matt Gillaspie**
**Senior Vice President**
matthew.r.gillaspie@pjc.com
515 247-2353

**Tim Oswald**
**Managing Director**
timothy.j.oswald@pjc.com
515 247-2358

**Travis Squires**
**Senior Vice President**
travis.t.squires@pjc.com
515 247-2354

**Des Moines Public Finance**
TF 800 333-6008

piperjaffray.com
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What do you know about

Brief History

1962 – August - Originated
   28 Business Managers Present

1967 - Joined ASBO International after mandatory 3 yr waiting period.
   501 c (3) – subordinate to ASBO Intl

1992 – First IASBO Executive Director employed – Norman Pogemiller

1995 - School Board Secretary Association merges with Iowa ASBO

2002 – IASBO partner with ISU for 0.50 FTE Executive Director services who will also be director of la School Business Mgmt Academy and be a graduate program professor for ISU – Dr. James Scharff appointed to serve

2003 - first vendor / trade show with 32 vendors at West Des Moines Sheraton

2003 - IASBO included in legislative mandated state insurance commission study of health ins. issues

2003 - newsletter converted from paper to electronic

2004 – IASBO mentor program began – later transitioned to new SBO training program

2005 - Annual meeting & vendor show moved to Scheman Center in Ames

2005 - Fiscal reserve study to determine Minimum Fiscal Reserve Measure as applicable to the General / Operating Fund
   Districts should endeavor to establish a DNC greater than 50
   Districts that wish to establish a positive net interest pattern maintain a 70 DNC level.
   Districts should assess the payroll distribution dates, board of education meeting and bill payment schedules

2005-06 - First Critical Dates Calendar with monthly tasks, links to applicable sites, etc.
Developed and annually updated by regional directors

2006 - Academy Curriculum revised and restructured to 4 year program with assessment based option

2006 – IASBO Professional Leadership Award initiated
2007 - Joined with 11 other states in pCard program

2007 - Begin summer “Boot camp” sessions for new business managers

2007 - Begin special topic one day workshops

2008 - Work with IASB, SAI, ISEA to successfully change legislation on 403b / TSA requirements

2008 - Begin Certified Budget workshops for new SBO

2008 - Employ part-time Professional Development Coordinator - Nancy Blow - 0.5 FTE

SBO Authorization

• 2008 Begin communication with D.E. Director and supportive legislators re: authorization for SBO
• 2009 Legislative support of ISEA, SAI and IASB
• 2010 Legislation passed for SBO authorization
• 2012 SBO authorization implemented

2010 - Begin external independent annual audit of IASBO accounts

2010 - Begin monthly webinar sessions led by IASBO Bd. members for new SBO

2010 - Begin use of webinar delivery for two annual regional meetings

2011 - Discontinue partnership with ISU for Executive Director - Dr. James Scharff appointed to serve as 0.65 FTE Executive Director

2011 - Begin use of credit cards for on-line payment of IASBO conference registrations & membership dues

2011 - Develop a policy / operations manual for the Iowa ASBO Board

2012 – Transition corporate partners to “levels” rather than piecemeal event support

2002 - $1,500
2015 - $51,000

2012 - received B.O.E.E. approval as renewal credit provider for SBO authorization renewal credits

2012 - New website provider for credit and transcript processing

2012 – IASBO 50th anniversary theme “There’s No Business Like School Business”

2013 - Develop SBO recruitment instruments to:

• Identify responsibilities and tasks for job description that match to SBO standards and criteria
• Sample interview questions
• Sample performance review

2013 – Develop IASBO Duties of Offices document to provide information to potential board and regional director candidates of the responsibilities and expectations of each position

2014 - Desk task calendar printed to coordinate with Calendar of Critical Dates
2014 - Segregation of Duties Book to improve internal controls in small offices

2014 - First “official” Iowa ASBO Strategic Plan

Mission: (our ideal)
To provide programs and services that promote the highest standards of school business management practices and professional growth.

Vision: (our dream)
To support the needs of our members by equipping them to be leaders in their schools, profession and community.

Values: (our foundation)
Honesty:
Integrity:
Fairness:
Objectivity:
Cooperation:

2014 - Fall Conference moved to Meadows Event Center upon outgrowing the West Des Moines Sheraton

2014 – Begin Partnership with US Communities

2015 - Establish “Friend of Iowa ASBO” recognition

2015 – Social responsibility program at fall conference

2016 - Establish Member “Scholarship” opportunities for personal professional development
    Aspiring SBO - Waive IASBO basic dues when join ASBO Intl first time
    Veteran SBO - $2,000 to attend ASBO Intl Major Event
    ASBO Intl membership support – to serve on ASBO Intl Committee or present at ASBO Intl Conf

2016 - Conference “app”

2016 - Electronic badge scanning for SBO renewal credit

2016 – Develop IASBO staff transition / succession plan

Post-Conference Networking Activities
2003 – Ingersoll Dinner Theatre
2004 – Civic Center Theatre
2011– Perfect Games
2012 – Casino night & Anniv Celeb.
2013 – Blue Moon – Improv at Winery
2014 – Johnny Holms band & Dueling Pianos
2015 – karaoke band - game night
2016 - magician
Membership
1962 – 28 - $5 dues 
2017 – 485 - $125 dues

Conference Attendance
Fall 2002 – 224 
Fall 2016 – 410

IASBO Financial
2002-03 – association equity = 35,192 
annual expenditure budget = 163,050
2016-17 – association equity = 539,780 
annual expenditure budget = 413,067 (excl pcard)
(non-dues generated revenue since 2002 )
Pcard retained $285,317
Corporate partners $426,979
Trade show $172,844
$884,340

Iowa ASBO on ASBO Intl Board
1970s - Fred Wessendorf
2000s - Paul Bobek
2016 - Ed Chabal
President
Kevin Kelleher  Executive Director of Finance and Business Services
Dubuque CSD
2300 Chaney Road
Dubuque, IA 52001-3095
Ph: 563-552-3038  |  e-mail: kelleher@dbqschools.org

President-Elect
Waukee CSD
560 SE University  Waukee, IA 50263
Ph: 515-987-5161
Email: LAPPZELLERMILLER@WAUKEESCHOOLS.ORG

Past President
Melissa Fettkether - Business Manager
Postville CSD
PO Box 717
314 West Post St  Postville, IA 52162
Ph: 563-864-7651
Email: mfettkether@postville.k12.ia.us

Secretary
Mary Beth Fast – Business Manager
Urbandale CSD
11152 Aurora Ave, Urbandale, IA 50322
Ph: 515-457-5003
Email: fastm@urbandaleschools.com
Term - July 1, 2016 - June 30, 2018

Treasurer
Kim Sheets – Business Manager
Fairfield CSD
403 S 20th Street
Fairfield, IA 52556
Ph: 641-472-2655
Email: kim.sheets@fairfieldsfuture.org
Term - July 1, 2017 - June 30, 2019

District Directors

District ONE
(Regions 1, 5, 6, 7, and 10)
Denelle Gonnerman – Supervisor Financial Serv.
Cedar Falls CSD
1002 West First St
Cedar Falls, IA 50613
Ph: 319 553-2434
Email: denelle.gonnerman@cfpschools.org
Term - July 1, 2017 - June 30, 2019

District TWO
(Regions 2,3,4,8, and 9)
Brian Gubbels – Director of Finance
Harlan CSD
2102 Durant Street, Harlan, IA 51537
Ph: 712-755-2152
Email: bgubbels@hcsscyclones.com
Term - July, 2017 - June 30, 2018
- (complete Appenzeller term)

Support Resources:

Executive Director
James R. Scharff, Ph.D
2854 N.W. North Creek Circle
Ankeny, IA 50023
Cell ph: 515-210-7457
Email: james.scharff@iowaasbo.com

Assistant Director:
Nancy Blow
62 Hidden River Court
Tipton, Iowa 52772
Email: iowaasbo@gmail.com
Cell ph: 319-931-1833

Legal Counsel
Danielle Jess Haindfield, Attorney
Ahlers Law.
100 Court Ave. Suite 600
Des Moines, Iowa 50309
Phone: 515-243-7611
Fax: 515-243-2149
e-mail: DHaindfield@ahlerslaw.com
Iowa Association of School Business Officials
Regional Directors 2017-2018

Region 1
Melissa Fettkether - Business Manager
Postville CSD
PO Box 717
314 West Post St Postville, IA 52162
Ph: 563-864-7651
Email: mfettkether@postville.k12.ia.us
Term Ends: June 30, 2019

Region 2
Helen Burrington - SBO
Osage CSD
820 Sawyer Drive Osage IA 50461
Ph: 641-732-5381
Email: hburrington@osage.k12.ia.us
Term ends June 30, 2018

Region 3
Kim Dykstra – Business Manager
MOC – Floyd Valley CSD
709 8th St SE Orange City, IA 51041
Ph: 712-737-4873
Email: kdykstra@moc-fv.k12.ia.us
Term ends June 30, 2019

Region 4
Brandon Hansel - Director of Financial Services
Ft. Dodge CSD
104 S. 17th St.
Fort Dodge IA 50501
Ph: 515-574-5644
Email: bhansel@fort-dodge.k12.ia.us
Term ends June 30, 2018

Region 5
Denelle Gonnerman – Supervisor Financial Serv.
Cedar Falls CSD
1002 West First St
Cedar Falls, IA 50613
Ph: 319-553-2434
Email: denelle.gonnerman@cfschools.org
Term ends June 30, 2019

Region 6
Claudia Wood
Davenport CSD
1606 N. Brady Street Davenport IA 52803-4714
Ph: 563-336-5095
Email: woodel@davenportschools.org
Term ends June 30, 2018

Region 7
Kristy Bruce – Finance Consultant
Grant Wood AEA
401 6th St SW Cedar Rapids, IA 52404
Ph: 319-399-6772
Email: kbruce@gwaea.org
Term ends June 30, 2019

Region 8
Nick Lenhardt
Des Moines Public Schools
2323 Grand Ave, Des Moines, IA 50312
Ph: 515-242-7745
Email: nicholas.lenhardt@dmschools.org
Term ends June 30, 2018

Region 9
Brian Gubbels – Director of Finance
Harlan CSD
2012 Durant St Harlan, IA 51537
Ph: 712-755-2152
Email: bgubbels@hcsdcyclones.com
Term ends June 30, 2019

Region 10
Chad Vink – SBO
Oskaloosa CSD
Box 71, Oskaloosa, IA 52577
Ph: 641-673-8345
Email: vinkc@oskycsd.org
Term ends June 30, 2018
Iowa ASBO Representatives to the Iowa School Business Management Academy
2017-2018 Professional Growth Committee

IASBO President
Kevin Kelleher - Dubuque CSD
2300 Chaney Road
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Ph: 563-552-3038
Email: kkelleher@dbqschools.org

IASBO President Elect
Lora Appenzeller-Miller – Waukee CSD
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Claudia Wood – Davenport CSD
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Ph: 563-336-5095
Email: woodcl@davenportschools.org
Term – July 1, 2014 – June 30, 2018

J.T. Anderson – Linn-Mar CSD
2999 N. 10th Street – Marion IA 52302
Ph: 319-447-3008
Email: jtanderson@linnmar.k12.ia.us
Term – July 1, 2014 – June 30, 2018

Tom Anderson – West Liberty CSD
111 W 7th Street
West Liberty, IA 52776
Ph: 319-627-2116
Email: tanderson@wl.k12.ia.us
Term – July 1, 2014 – June 30, 2018

Jeffery Dieleman
Business Manager - Washington CSD
404 West Main Street – Washington, IA 52353
Ph: 319-653-6543
Email: jdielema@washington.k12.ia.us
Term – July 1, 2015 – June 30, 2019

Jackie Wells
Business Manager – Central Lyons CSD
1010 S Greene Street – Rock Rapids, IA 51246
Ph: 605-595-2697
Email: jwells@centrallyon.org
Term – July 1, 2016 – June 30, 2020

Greg Reynolds – Burlington CSD
1429 West Avenue – Burlington, IA 52601
Ph: 319-753-6791
Email: greg.reynolds@bcsds.org
Term – July 1, 2016 – June 30, 2020

Sandy Elmore – Ft Madison CSD
930 Ave M
Ft Madison, IA 56267
Ph: 319-372-7252
Email: sandy.elmore@fmcsd.org
Term – July 1, 2017 – June 30, 2021

Kristin Wood – Hamburg CSD
309 S Street
Hamburg, IA 51640
Ph: 712-242-5417
Email: Kwood@nishbd.org
Term – July 1, 2017 – June 30, 2021

Nancy Blow – IASBO representative
Assistant Executive Director of IASBO
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Barb Harms – AEA Bus Mgr Representative
Manager – Grant Wood AEA
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Patti Schroeder – IASB Representative
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Dr. Roark Horn – SAI Representative
Executive Director
School Administrators of Iowa
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Andy Nielsen, CPA
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Danielle Haindfield – Legal Monitor
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Director ISBMA
Dr. Debra Van Gorp
Clinician & Director of ISBMA
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IoWA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
LIST OF PRESIDENTS CURRENTLY SERVING AS SBO

1995-1996 Steve Graham
1996-1997 Craig Hansel
2001-2002 Paul Bobek
2002-2003 Donna Beerman
2005-2006 Jackie Black
2006-2007 Marsha Tangen
2007-2008 Wm. Edward Chabal
2009-2010 Leslie Finger
2010-2011 Kurt Subra
2011-2012 Jan Miller-hook
2013-2014 Angie Morrison
2014-2015 Michelle Wearmouth
2015-2016 Doug Nefzger
2016-2017 Melissa Fettkether
2017-2018 Kevin Kelleher
# Iowa Association of School Business Officials
## Duties of Offices

### President
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Develops topics for conference sessions
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs
- Presides over the fall and spring conferences
- Presides over board meetings
- Presents (or co-presents with President-Elect) at IASB conference in November
- Prepares quarterly newsletter articles
- Serves on Professional Development committee
- Serves on State Finance Roundtable committee
- Attends IASBO Leadership Conference
- Attends ASBO conference in another state
- Attends ASBO International Convention
- Attends ASBO International Leadership Conference
- Appoints committees when necessary
- Compiles evaluation results and meets with Executive Director
- Confers with President-Elect and Past-President to calculate salary increases for Executive and Assistant Executive Directors
- Presents slate of nominees for offices at the annual meeting

### President-Elect
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs
- Develops topics for conference sessions

### President-Elect
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Develops topics for conference sessions
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs
- Presides over Regional Chair meetings
  - Professional Leadership Awards
  - Confers with Regional Directors to score PL Applications
- Presents Professional Leadership Awards
- Serves on Professional Development committee
- Attends IASBO Leadership Conference
- Attends ASBO conference in another state
- Attends ASBO International Convention
- Attends ASBO International Leadership Conference
- Produces nominees for office with other past-presidents
- Presents slate of nominees for offices at the annual meeting
Treasurer
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Develops topics for conference sessions
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs
  - Monthly:  
    o receive email from Exec Director with claims for reimbursement, bank statements & revenue & expense reports from IASBO acctg system.
    o review & approve Exec Director claims via email noting month & $ amount approved
    o reconcile bank statements
    o update check register sequence spreadsheet (auditors request this when preparing annual audit)
    o prepare financial reports for board approval & submit to Exec Director
    o review sample of checks from printed check register rec’d from exec director with on-line bank acct to verify vendor, date, amount of payment etc.
  - Annual:  
    o December:  
      o receive or request report of vendors paid $600 or more for the calendar year
    o January:  
      o prepare information for & coordinate printing/distribution of W2s & 1099s with Asst. Director
    o June/July:  
      o assist IASBO attorney with preparation of contracts for IASBO employees (verify salary amounts/calculations)
    o July/August:  
      o work with Exec Director & IASBO auditor to compile/provide requested audit information

Secretary
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Develops topics for conference sessions
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs
- Records minutes of all board meetings and provides transcription for board action and publishing on website

District Directors on the IASBO Board
- Attends all IASBO Board meetings and commits time necessary to fulfill duties of the office
- Develops topics for conference sessions
- Serves on IASBO committees as necessary
- Prepares and presents up to two webinars per year for new SBOs

Regional Director
- Attends all IASBO meetings and commits time necessary to fulfill duties of the office, both in the local region and at the state level
- Develops topics, with board members, for IASBO spring and fall conference sessions
- Arranges locations for regional meetings
- Prepares agenda/topics/speakers for regional meetings
- Identifies professional leadership award nominees from local region
Security Benefit

Increase 403(b) Plan Satisfaction

Tools to Help Grow Savings and Participation

- Security Benefit has been serving education professionals for nearly five decades
- Innovative retirement plan solutions, including 403(b) plans, 457 plans, and 403(b) Special Pay and Matching Plans
- Personal retirement analysis and reports
- Professional, local service from a professional financial advisor
- Multiple retirement strategies to help meet the different needs of those just beginning their career to those ready for retirement

For more information about retirement programs, or for a comprehensive review of your current plan contact 800.747.5164, option 3 | SecurityBenefit.com
Iowa ASBO Collaboration with other non profit agencies / associations

Department of Education
- Long standing positive relations with all members of finance team
- Reliance on interpretation, presentations and direction

Board of Educational Examiners
- Provide approval for SBO renewal credit sessions

Iowa Association of School Boards
- Historically positive and mutually supportive relations
- Assisted in financial support of IASBO in early years

Iowa Supt Finance Leadership
- Cooperate with IASBO support of SBO renewal credit course approval and credit management

School Administrators of Iowa
- Long standing cordial working relations
- First 10 year of IASBO Exec. Dir. housed at SAI offices for a fee
- Appears to be somewhat limited by majority of their energy consumed by principal program needs
- Cooperate in alternate year student activity fund workshop – split proceeds

Iowa School Business Management Academy - Iowa State University
- Long standing relations since inception of ISBMA in 1991 with programs offered at fall and spring IASBO conferences
- Shared director from 2002-2011
- Provide IASBO members to ISBMA advisory committee
- IASBO provides SBO renewal credit approval and credit management for ISBMA sessions
• IASBO pays ISBMA $5 for each attendee at Spring and Fall second day a.m. sessions (negotiated alternative to long standing exchanging of funds)

Iowa State Education Association

• Collaboration with lobbying on legislative change from “any willing provider” language to current access to DAS 403b programs
• Collaboration with lobbying for SBO authorization legislation
• Dialogue on concerns of mutual interest (ACA and “cash in lieu of insurance”)

ASBO Intl

• Iowa is usually in top 12-14 affiliates in terms of membership numbers in ASBO Intl
• Iowa participates in ASBO Intl leadership with membership on board, executive directors leadership, committee membership
• Iowa ASBO provides expenses for approximately 7-10 IASBO members to attend the annual ASBO Intl conference each year
Iowa ASBO pCard distributions:

2016-2017 Summary
Total spent by 1009 districts in 16 participating states was $353,237,740
Total spent by 95 participating Iowa districts: $41,905,715 ($38,480,327 in 2015-16)
Total Rebate to IASBO: $529,089 ($473,998 in 2015-16)
Rebate to Districts: $471,141 ($418,503 in 2015-16)

Highest rebate check - $107,649 ($101,742 in 2015-16)
Average rebate check - $4,907 ($4,650 in 2015-16)
Highest pcard spending per student - $1,072 ($1,228 in 2015-16)
Average pcard spending per student - $198 ($182 in 2015-16)
Net rebate % High = 1.31% Average = 1.05% Minimum = 0.94%
Retained Rebate to IASBO: $57,492 ($55,495 in 2015-16)

2016-2017 Rebate distribution

<table>
<thead>
<tr>
<th>pCARD</th>
<th># districts</th>
<th>Total spent</th>
<th>Rebate to districts</th>
<th>LEA Cumulative</th>
<th>retained rebate IASBO Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-08</td>
<td>6</td>
<td>$111,258</td>
<td>$778</td>
<td>$778</td>
<td>$222</td>
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<tr>
<td>2008-09</td>
<td>14</td>
<td>$1,009,427</td>
<td>$8,075</td>
<td>$8,853</td>
<td>$2,019</td>
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<tr>
<td>2009-10</td>
<td>20</td>
<td>$3,124,996</td>
<td>$26,250</td>
<td>$35,103</td>
<td>$6,562</td>
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<tr>
<td>2010-11</td>
<td>25</td>
<td>$6,268,942</td>
<td>$54,164</td>
<td>$89,267</td>
<td>$13,541</td>
</tr>
<tr>
<td>2011-12</td>
<td>34</td>
<td>$12,883,007</td>
<td>$113,371</td>
<td>$202,638</td>
<td>$28,343</td>
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<tr>
<td>2012-13</td>
<td>52</td>
<td>$16,507,355</td>
<td>$148,634</td>
<td>$351,272</td>
<td>$33,014</td>
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<tr>
<td>2013-14</td>
<td>72</td>
<td>$24,937,571</td>
<td>$245,911</td>
<td>$597,183</td>
<td>$38,072</td>
</tr>
<tr>
<td>2014-15</td>
<td>82</td>
<td>$35,609,150</td>
<td>$375,829</td>
<td>$973,012</td>
<td>$50,101</td>
</tr>
<tr>
<td>2015-16</td>
<td>87</td>
<td>$38,480,327</td>
<td>$418,513</td>
<td>$1,391,525</td>
<td>$55,495</td>
</tr>
<tr>
<td>2016-17</td>
<td>95</td>
<td>$41,905,715</td>
<td>$471,141</td>
<td>$1,862,666</td>
<td>$57,492</td>
</tr>
</tbody>
</table>

IASBO funding applied toward non-program purposes (speakers, social events, ASBO Intl campaign support, prof leadership recognition, etc.)
Iowa / Illinois pCard program

Iowa ASBO has participated in the multi-state pCard program initiated by Illinois ASBO since 2007. A pCard is essentially a credit card with controls on spending limits, purchases etc. to enhance internal controls. This program was designed by ASBO affiliates for public education agencies to serve their needs and interests and make the benefits available to all size districts.

How does it help schools?
- Improves internal controls by virtue of limits and controls that can be placed on each card:
- Reduces the volume of paper for purchase orders and checks processed through the business office:
- Provides a token rebate to encourage / reward use:

Why participate in this program rather than one offered by banks and other credit card companies?
- Designed and monitored by and for schools rather than the profit motive of corporate cards:
- Competitive rebate:
- Chosen by 14 other states as the preferred program:

What is the application process?
- Download two files containing the application forms from the pCard section of the Iowa ASBO website:
- Determine the monthly credit limit to be requested (call Exec. Director for calculation options):
- Pass a board resolution approving the program application:
- Complete the forms where blanks are indicated and submit to Iowa ASBO for review and forwarding to the credit rating agency: (they use the prior 3 audits found on the state auditor’s website)
- Plan implementation: (cards to many or a few)
- Implement:
- Plan on about 2-3 months from the time you decide to participate until cards are actually in use:
The distribution of proceeds from US communities shall be made according to the following guidelines:

The amount available as of June 30 each year will be distributed one-third each to:
1. Campaign account for Board endorsed candidate running for ASBO Intl leadership
2. Scholarships for Iowa ASBO members who have not previously belonged to ASBO Intl
3. Encouragements to career SBO Iowa ASBO members who belong to ASBO Intl that serve on ASBO Intl committees or have been approved to provide professional sessions at ASBO Intl conferences

Calculation of distributable amounts will be made based on the amount received the prior fiscal year as of June 30 each year.

Contributions to a campaign account will be considered only when there is an active campaign in process.

Scholarship awards criteria for membership in ASBO Intl:
- shall be for two years per approved applicant
- applicant shall not have been an ASBO Intl member prior to application
- awards shall reimburse the recipient $200 per year for up to two years

Encouragement to career SBOs criteria:
- applicant shall have been an ASBO Intl member for a minimum of 3 years
- award recipient approved to serve on an ASBO Intl committee will be approved for a one time reimbursement up to $500 for expenses not paid by ASBO Intl for lodging and transportation related to committee service
- award recipient shall be reimbursed up to $1,000 for expenses related to registration, lodging and transportation to make a presentation at ASBO Intl Conference.
- award shall be approved to individuals who have not received the award within the past 5 years

Applications:
- The application review committee shall be comprised of the Iowa ASBO Executive Director, Past President and President
- Applications shall be due by June 30 each year

Scholarship application content:
Name and demographic data

Encouragement application content:
Name and demographic data
Date of membership in ASBO Intl that exceeds a minimum of 3 years
Confirmation of date and topic of approved ASBO Intl presentation OR
Confirmation of approval as ASBO Intl committee membership
US Communities ASBO Intl Scholarship recipient comments.

I have thoroughly enjoyed my membership with ASBO International and plan to continue that membership for many years to come. This year I specifically appreciated the discussion threads and daily emails keeping me abreast of education issues across the nation. I am also registered for the ASBO International conference in Denver this fall for the first time. Thank you for your generous support of my membership in ASBO International. Kristy Bruce

Kristy Bruce
Finance Consultant
Grant Wood AEA

I have certainly benefited from the ASBO Scholarship. The publications, School Business Leader and School Business Affairs have had very timely articles that are informative for my particular situation in changing districts and developing leadership. I’ve also picked up valuable insights through the ASBO emails and it’s reassuring to know that others have similar challenges.

Thank you for the opportunity to participate in ASBO International.

Looking forward to seeing you soon,
Mary Beth

Mary Beth Fast
Chief Financial Officer
Urbandale Community School District

<table>
<thead>
<tr>
<th>US Comm</th>
<th>Distribution of 1/3 each to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rcnts</td>
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<tr>
<td>---------</td>
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</tr>
<tr>
<td>2014-15</td>
<td>2,240.99</td>
</tr>
<tr>
<td>2015-16</td>
<td>8,435.26</td>
</tr>
<tr>
<td>2016-17</td>
<td>8,968.00</td>
</tr>
</tbody>
</table>

Corporate Partner Impact on Iowa ASBO
The following table shows the change in revenue generated by our corporate partners. Prior to 2011 individual corporate partners would provide support for a conference snack break, speaker, etc. In 2011 this “piecemeal” approach was changed to a “level” system with varying levels garnering access to Iowa ASBO member attention depending on their marketing interests and needs. The “levels” can be found on the IASBO website. The table since 2002-03 illustrates the impact of the change.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>1,500</td>
</tr>
<tr>
<td>2003-04</td>
<td>1,950</td>
</tr>
<tr>
<td>2004-05</td>
<td>1,500</td>
</tr>
<tr>
<td>2005-06</td>
<td>3,000</td>
</tr>
<tr>
<td>2006-07</td>
<td>3,000</td>
</tr>
<tr>
<td>2007-08</td>
<td>7,500</td>
</tr>
<tr>
<td>2008-09</td>
<td>6,350</td>
</tr>
<tr>
<td>2009-10</td>
<td>9,500</td>
</tr>
<tr>
<td>2010-11</td>
<td>16,900</td>
</tr>
<tr>
<td>2011-12</td>
<td>48,900</td>
</tr>
<tr>
<td>2012-13</td>
<td>42,079</td>
</tr>
<tr>
<td>2013-14</td>
<td>48,000</td>
</tr>
<tr>
<td>2014-15</td>
<td>87,000</td>
</tr>
<tr>
<td>2015-16</td>
<td>52,000</td>
</tr>
<tr>
<td>2016-17</td>
<td>97,000</td>
</tr>
</tbody>
</table>

* Includes $30,000 for 2015-16
* Includes $5,000 from VOYA to campaign
* Includes $5,000 from VOYA to campaign

426,179
Advantages for the Education Industry.
We assist more than 3,600 school districts nationwide with their Section 125 programs.

Great Employee Benefits That Benefit The Employer, Too
At American Fidelity, we believe in supporting the education community. That’s why we create benefits that educators want, with competitive rates. We’ve been serving the education community since 1965 and proudly assist more than 3,100 school districts across the nation with their Section 125 Plans. Plus, more than 44 state and national education associations have endorsed us as an insurance provider they trust.

View your benefit program from a new perspective
Perspective Consulting Partners is a trusted resource for Iowa School Districts specializing in:

- Health
- Life and AD&D
- Disability
- Dental
- Vision
- Flexible Spending Accounts
- HSA / HRA
- Federal & State Legislative Compliance
- Post Employment Plan Strategies

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www.PerspectiveCP.com

View is a matter of perspective
## IASBO Budget

### Revenue 16-17 Actual | 17-18 Budget
---|---
Conference Registration Fees  
Fall (350 x $175) | 67,531.00 | 66,750
Spring (350 x $175) | 68,688.00 | 66,750
Membership Dues | 59,990.00 | 59,375
Renewal Credit Management | 20,350.00 | 16,250
Investment Interest check | 51.42 | 100
Interest savings & CD | 4,466.36 | 250
Corp partners - donations | 134,500.00 | 60,000
Bootcamp (25 x $75) | 2,250.00 | 2,000
Budget wkshop | 1,180.00 | 2,000
Fall Orientation | 450.00 | 450
Special Clinics - Act / const / pa | 15,120.00 | 12,000
US Communities | 8,968.25 | 9,000
Trade Show | 33,315.90 | 32,500
**p-card program** | 529,088.88 | 575,000
Publications | - | -
Other Receipts | 1,322.00 | 500
Merchandise | - | -

**subtotal regular activities** | 375,898.78 | 286,425

### Expenditures 16-17 Actual | 17-18 Budget
---|---
Conference Expenses  
Bootcamp | 2,227.69 | 2,000
Fall Conference | 44,233.20 | 45,000
New Bd Sect. Wed Bootcamp | 1,228.73 | 1,500
Spring Conference and trade show | 45,278.96 | 45,000
Winter/Summer Leadership | 4,035.02 | 4,000
Cert Bgd Workshop | 1,712.18 | 1,500
Conf. Profess. Speakers / Social | 19,122.71 | 20,000
IASBO Professional Leadership | 2,299.17 | 2,500
P-Card | 473,046.59 | 515,000
Legal Expenses | 3,956.00 | 3,979
Bank & Credit Card Fees | 5,498.92 | 6,000
ASBO Intl Advocacy | 14,350.00 | 15,000
Nat Conf Hosp | 1,200.00 | 1,200
Newsletter | 1,200.00 | 1,200
Refunds | 2,788.00 | 2,000
Insurance | 3,965.00 | 3,979
Office Equipment / Supplies | 1,336.36 | 2,200
Technology / Web Expense | 10,925.57 | 15,000
US Communities | 2,811.75 | 9,000
Trade Show | 33,315.90 | 32,500
Beginning Balance | 478,622.29 | 539,780.38
rev | 947,271.81 | 902,925.00
exp | 886,113.72 | 974,219.40
**Total Cash Rcpts.** | 947,271.81 | 902,925.00
7/1/2016 | 6/30/2017
checking balance | 61,774.03 | 37,704.65
savings | 166,848.26 | 252,075.73
CD | 250,000.00 | 250,000.00
P-Card | 473,046.59 | 515,000

**Notes:**

Revenue 2016-17  
Corporate Partner rcvd in June 2017 for 2017-18 of $37,500

Expenditure budget 2017-18  
Technology / Web expense increased by $5,000 for web re-design
Consultant Services for marketing category added to develop materials and strategic planning support
### IASBO 2016-17 EXCLUDING PCARD PASS-THROUGH

<table>
<thead>
<tr>
<th></th>
<th>Revenue including pcard retained rebate</th>
<th>Expenditures including net pcard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2016-17 actual $</strong></td>
<td><strong>2016-17 actual $</strong></td>
<td></td>
</tr>
<tr>
<td>Membership</td>
<td>59,990</td>
<td>Conferences</td>
</tr>
<tr>
<td>Credit Mgmt</td>
<td>20,350</td>
<td>Credit Mgmt</td>
</tr>
<tr>
<td>Conferences</td>
<td>155,219</td>
<td>Board</td>
</tr>
<tr>
<td>Corporate</td>
<td>134,500</td>
<td>Staff</td>
</tr>
<tr>
<td>Other</td>
<td>5,840</td>
<td>ASBO Advocacy</td>
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<tr>
<td>Retained pcard</td>
<td>57,492</td>
<td>Member Prog / schol / legal / audit / etc</td>
</tr>
<tr>
<td>US Communities</td>
<td>8,968</td>
<td>Net pcard</td>
</tr>
<tr>
<td>Vendor Show</td>
<td>33,316</td>
<td>Vendor show</td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
<td><strong>475,675</strong></td>
<td><strong>414,974</strong></td>
</tr>
</tbody>
</table>

#### Pie Charts

**2016-17 Receipts**
- US Communities: 12%
- Vendor Show: 7%
- Memberships: 13%
- Credit Mgmt: 4%
- Corporate: 28%
- Conferences: 33%

**2016-17 Expend.**
- Conference: 31%
- Net pcard: 0%
- Vendor Show: 3%
- ASBO Advocacy: 3%
- Board: 4%
- Credit Mgmt: 35%

---

### InTouch Receiving Suite

**End to End Point of Sale for schools with real-time integrated online payments and credit card**

- InTouch Receiving is proven to quickly improve internal financial controls, increase revenue collections for all funds and all sites, streamline workflow and eliminate duplicate entry.
- InTouch is robust, audit friendly and easy to use. InTouch allows for credit card collections at the counter and on the web – integrated real time for an excellent parent experience.
- InTouch has the finest, most integrated web site available – designed with K-12 in mind: from parent, community, teachers, fundraising and more considered and supported.
- Integrates with food service, SIS, library and G/L

**Contact:**
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- sales@intouchreceiving.com
- www.intouchreceiving.com

**Find out why InTouch Receiving is the #1 rated method to collect monies district-wide**

**Learn why business and finance managers trust InTouch to take care of their school business**

**Email us - ask for many of our great Iowa school districts clients**
<table>
<thead>
<tr>
<th>IASBO 2016-17</th>
<th>Revenue including pcard retained rebate</th>
<th>Expenditures including net pcard</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-17 actual</td>
<td>$</td>
<td>2016-17 actual</td>
</tr>
<tr>
<td>Membership</td>
<td>$59,990.00</td>
<td>Conferences</td>
</tr>
<tr>
<td>Credit Mgmt</td>
<td>$20,350.00</td>
<td>Credit Mgmt</td>
</tr>
<tr>
<td>Conferences</td>
<td>$155,219.00</td>
<td>Board</td>
</tr>
<tr>
<td>Corporate</td>
<td>$134,500.00</td>
<td>Staff</td>
</tr>
<tr>
<td>Other</td>
<td>$5,839.78</td>
<td>ASBO Advocacy</td>
</tr>
<tr>
<td>pcard</td>
<td>$529,088.88</td>
<td>Member Prog / schol / legal / audit / etc</td>
</tr>
<tr>
<td>US Communities</td>
<td>$8,968.25</td>
<td>pcard</td>
</tr>
<tr>
<td>Vendor Show</td>
<td>$33,315.90</td>
<td>Vendor show</td>
</tr>
<tr>
<td></td>
<td>$947,271.81</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2016-17 total income</th>
<th>2016-17 expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>pcard 56%</td>
<td>Conferences 14%</td>
</tr>
<tr>
<td>US Communities 1%</td>
<td>Cr. Mgmt 7%</td>
</tr>
<tr>
<td>Vendor Show 4%</td>
<td>Board 2%</td>
</tr>
<tr>
<td>Membership 6%</td>
<td>Staff 16%</td>
</tr>
<tr>
<td>Credit Mgmt 2%</td>
<td>Advocacy 2%</td>
</tr>
<tr>
<td>Conferences 16%</td>
<td>Member Prog / schol / legal / audit / etc 9%</td>
</tr>
<tr>
<td>Corporate 14%</td>
<td></td>
</tr>
<tr>
<td>Other 1%</td>
<td></td>
</tr>
</tbody>
</table>

Trusted by more than 70% of Iowa school districts, the School Accounting System got even better.

Our cloud-based version of the School Accounting System provides access to your accounting information from anywhere and allows you to focus on what is really important — your job. Let us worry about the rest. We handle the hosting, updates, and backups.

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What Iowa Benefit Administrators Can Learn from the Aftermath of Wisconsin’s Act 10: The law that ended bargaining rights for public sector employees
By: Steve Ott

Iowa’s House File 291, passed in March 2017, limits public worker’s collective bargaining and negotiating rights. This puts Iowa’s public workers/ employers onto a new playing field when it comes to salary/ benefits. In Wisconsin, a similar law (Act 10) was passed in 2011. Here are 3 key takeaways, lessons, and trends that Iowa schools, cities, and counties can glean from Wisconsin’s journey so far.

Lesson #1: Just because we can, doesn’t mean we should
Once Act 10 was approved, some organizations took advantage of the new law and radically changed their health plans to save money – raising deductibles, lowering benefits, switching carriers, and increasing their employees’ premiums. As a result of this sudden change, many of employers saw their top talent walk right out the door. Other organizations took a slower, more cautious approach. Instead of making a sudden, significant change, they opted to make small changes to ease employees through the transition. Some had communicated to employees about the law and the necessary upcoming changes. Others developed insurance committees where employees and administration met to discuss, plan for, and negotiate benefit changes.

Conversing/collaborating made employees feel empowered, helped them be better consumers, and educated them about health insurance and their benefits work. They learned about cost and budgeting realities, how claims/benefit levels drive premiums, and possible solutions that could bring everyone together to combat the problem. Everyone came together as a team instead of sitting on opposite sides of the issue.

Coming together, helped organizations move to a higher deductible health plans combined with a funded HSA (Health Savings Account) or HRA (Health Reimbursement Arrangement). This may have been difficult to navigate before, but with education and discussion, the process was smoother. The HSA/HRA helped employees pay for out-of-pocket costs and saved both parties taxes. Unused funds can roll over to the next plan year, and will help employees start a tax-free savings account for future expenses and eventually, for healthcare costs in retirement.
Lesson #2: Taking a leadership perspective on salary and benefits
Prior to the collective bargaining/negotiating restrictions, the public worker’s contract laid everything out in writing – wages, hours worked, benefits, and pension. Salary and benefits were managed according to the contract.

Suddenly, Wisconsin administrators needed to take on a larger leadership role on this front. They quickly learned the importance of attracting/retaining employees with carefully crafted salary and benefit packages, as employees no longer had incentive to stay in one district for their career. Suddenly, employees became “free agents” and shopped for the best offer.

Just like private sector businesses, Wisconsin schools, cities, and counties started to benchmark their salary and benefits with their “competitors” in order to attract and retain talent. Administrators saw how salary/benefits created a push/pull effect with room for flexibility and balance. Some organizations made benefit plan changes which resulted in health insurance savings; allowing them to give wage increases.

They also found that they could get more creative with salary once the contract was gone. The single salary ladder tract was eliminated and replaced with compensation systems that were sustainable with a long-term impact. Wisconsin employers implemented performance-based increases, annual bonuses, and incentives programs for achieving specific accomplishments.

The flexibility and creativity helped them create balanced plans that honored both the employee’s dedication to public service, and lowered organizational cost, but were still attractive enough to get people to work and stay there.

Lesson #3: Policy Driven
Without a contract, Wisconsin administrators found they had to take charge of establishing/implementing workplace policies. This was a huge change in role for them. What’s needed to start? How do they establish effective policies?

Some organizations started by developing a mission/vision statement first; of which all policies flowed. These statements clarified the organization’s beliefs, as well as, set forth the governing principles of the organization itself and for the greater community. They laid out the organizations’ values, beliefs, its culture and goals. It also reminders everyone what’s important to the organization, drawing people together towards a common goal. Once the vision/mission statement and values were established, it became easier for administrators to create policies/procedures that effectively follow it.

Another new task for Wisconsin employers was to create employee handbooks. The book let employees know what is expected of them, laid out the organization’s culture, mission, and values, helped ensure key policies are clearly communicated, and ensured state/federal compliance. Creating policies based upon the missions/values created a good foundation that made for successful Wisconsin school districts, cities or counties, happy employees, and the ability to keep quality staff while attracting new employees.

Steve Ott, Regional Vice President of National Insurance Services, is a licensed insurance agent and registered representative with Series 6 and 63 securities licenses. Steve specializes in Life, Disability, Special Pay, HRAs, and 403(b)s for school districts, cities and counties in Nebraska, Iowa, Kansas and Missouri. He also specializes in full benefits consulting and Health Insurance in Iowa and Colorado.
Meritorious Budget Award

Congratulations to Des Moines Public Schools and Waukee Schools as recipients of the 2016-17 ASBO Intl Meritorious Budget Award!

What is the Meritorious Budget Award?

The MBA recognizes school districts in the United States and Canada for excellence in school budget presentation, setting a high standard for transparent budget development.

What is the mission of the Meritorious Budget Award (MBA) and the Pathway to the MBA program?

The mission of the MBA and the Pathway to the MBA program is to promote excellence in the presentation and development of school districts’ budgets.

The Pathway to the MBA is an introductory program that allows school districts to ease into full MBA compliance while still recognizing the same quality of budget presentation standards.

What are the required MBA application materials?

Your MBA application packet must include the following materials:

- Completed MBA application.
- Cover letter specifying any criteria that do not apply to your district.
- MBA Criteria Checklist (mandatory for all applicants).
- Previous year’s review team comments (if applicable).
- School district’s responses to the previous year’s comments (if applicable).
- Budget document.

Where do I find out more?

Go to the following link on the ASBO Intl website: http://asbointl.org/learning-career-development/awards-scholarships/meritorious-budget-award-pathway-to-the-mba-/faqs
Certificate of Excellence in Financial Reporting

The Gold Standard in Financial Reporting

For more than 40 years, the Certificate of Excellence in Financial Reporting (COE) has honored school districts for excellence and best practices in financial reporting.

Benefits of applying are two-fold: receive expert feedback to improve the quality of your Comprehensive Annual Financial Report (CAFR) and receive the prestigious COE award, which can improve the bond rating for your school district.

Transparency and fiscal accountability are critical in today's dynamic education environment, so there's never been a better time to apply for the COE. Apply for the COE!

Why Apply?

Earning the nationally recognized COE
  Shows your community that your district is credible and committed to fiscal integrity.
  Helps your district achieve a better bond rating from credit evaluations by clearly disclosing all required information.
  Demonstrates your district's transparency as you share financial information above and beyond what GAAP requires.
  Improves your CAFR with comments from finance professionals who provide actionable feedback.


Iowa District Recipients for the most currently reported year

<table>
<thead>
<tr>
<th>Ankeny Community School District</th>
<th>Cedar Rapids Community School District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cedar Rapids Community School District</td>
<td>Davenport Community School District</td>
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<tr>
<td>Davenport Community School District</td>
<td>Des Moines Independent Community School District</td>
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<tr>
<td>Dubuque Community School District</td>
<td>Fort Dodge Community School District</td>
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<td>Fort Dodge Community School District</td>
<td>Iowa City Community School District</td>
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<td>Iowa City Community School District</td>
<td>Johnston Community School District</td>
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<td>Linn-Mar Community School District</td>
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<td>Nevada Community School District</td>
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<td>Nevada Community School District</td>
<td>North Scott Community School District</td>
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<td>North Scott Community School District</td>
<td>Sioux City Community School District</td>
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<tr>
<td>Iowa district representatives</td>
<td>Iowa district representatives</td>
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<tr>
<td>for a quick pic at ASBO Int are:</td>
<td>for a quick pic at ASBO Int are:</td>
</tr>
<tr>
<td>Kevin Kelleher, Dubuque</td>
<td>Laura Appenzeller-Miller, Waukee</td>
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<tr>
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Unique Employee Benefits

Victoria McQuerry – Perspective Consulting Partners

Attracting and retaining quality employees is one of the most difficult tasks employers face. Benefit budgets are shrinking, but the need to retain top employees is growing. How can employers expand employee perks without busting the budget?

Ultimately, all employee benefits have associated costs. Some benefits have monthly premium costs, some impact payroll, and others touch administrative and overhead. This list of non-standard benefits seeks to leverage a positive return on spending.

Not all these options will be a good match for your organization. Use this list to spur other benefit ideas that can meet your employees’ needs. Encourage your leadership team to think “outside the box” when planning for your employees. Sometimes, the smallest benefit can have the biggest impact.

Volunteer Time Off
Volunteer time off is the cornerstone of low cost employee benefit perks. It is rapidly becoming an expected employer benefit. Volunteer time off can be structured to meet an employer’s needs. Some companies give employees a set number of hours per year to use at the non-profits of their choice. Other employers organize specific charitable events in which employees can elect to participate.
Volunteer time off allows employees time away while helping their communities. These programs place employers in a positive light within the community. For educational employers, volunteer time off can be structured as a school or district wide activity that supports learning outcomes.
Be sure to recognize those employees that take part in volunteer time off programs.

Peer to Peer Recognition Programs
Cultivating an environment where employees can recognize the great work of peers can foster a high performing workplace. Research shows that 80% of employees feel that recognizing a peer’s work makes them contribute more themselves. (O.C. Tanner, 2017)
Programs can be informal and simply allow peers to publicly recognize each other at meetings, via newsletters, or on a recognition webpage. If the budget allows, peer recognition programs can include incentives for those who have been nominated by their peers. Even a small incentive can be a meaningful benefit.

Student Loan Repayment
It is estimated that 71% of students graduating from 4-year colleges have student loan debt (studentloanhero.com, 2012). This issue is not limited to younger workers. The Federal Reserve estimates that there are 12 million student loan borrowers in their 30s.

Many education-based employers offer tuition support for current employees looking to further their education. This ensures that existing staff continue to grow and improve. Student loan repayment benefits, however, focus on helping employees pay off existing student loan debt.
Employees worked hard to earn their degrees. They have loyalty to employers who recognize that hard work. Student loan benefit providers can assist with facilitation of payment and ensure the benefit dollars are actually applied to employee loan balances. Employers can also save on benefit administration costs and independently fund reimbursement through payroll.

**Flexible Time Away**

Flexible time away is getting a lot of attention in the corporate work environment. Some corporations have even allowed unlimited time away for employees. Unlimited time away, however, is unlikely to work in the education environment where face time with students is key.

Time away for educational employees is often negotiated and clearly outlined in employment contracts. Education employers can begin to adopt some of the best practices of corporations by using non-standard time away policies that support top education goals.

For example, allowing classroom based educators time-away while still at school can help them make better use of planning time and improve teaching outcomes.

**Negotiated Discounts**

Negotiated discounts with local retailers and service companies can be great perks for employees. Even small discounts at dry cleaners, fitness centers, and eateries are appreciated. The cost of this benefit is limited to the time it takes to call and arrange discounts. Employers can post discounts on employee websites to avoid the cost of printing and distribution of discount cards.

**Pet Care Benefits**

Many employers are implementing policies that welcome pets into the workplace. But, not every workplace can welcome pets. Allergy issues and liability concerns prevent most employers from implementing a pets at work policy.

Pet-friendly workplaces can also include offering pet insurance and pet time away allowances. Surveyed employees preferred pet care time away and pet bereavement leave to policies that allowed pets in the workplace. (Pet-Friendly Workplace Survey, Banfield Pet Hospital, 2016) Workplace policies that recognize the role of pets in employee’s lives are also credited with increasing morale and employee loyalty.
On the Horizon

Critical Dates Calendar Webinar Series – See the list below of dates for the year. They are designed for members new to the profession. These 60 minute live webinar sessions, held monthly, are presented by IASBO Board members. The presentations normally follow the Critical Dates Calendar and will include upcoming deadlines and requirements. Members who join the webinars have the opportunity to ask questions via chat and receive valuable information. Curriculum is driven by the Critical Dates Calendar recently distributed to all members in booklet form and also found on the IASBO website. If you wish to participate in the webinars and did not receive an email, contact Nancy Blow at iowaasbo@gmail.com or call 319-931-1833.

Wednesday, August 30, 9:00 – Calendar of Critical Dates, Mary Beth Fast
Tuesday, September 19, 9:00 – Calendar of Critical Dates, Brian Gubbels
Wednesday, October 18, 9:00 – Calendar of Critical Dates, Lora Appenzeller-Miller
Tuesday, November 7, 9:00 – Negotiations, Ann Smisek and Aaron Hillgas, Ahlers
Thursday, December 14, 9:00 – Calendar of Critical Dates, Kim Sheets
Tuesday, January 9, 9:00 – Calendar of Critical Dates, Denelle Gonnerman
Thursday, February 1, 9:00 – Calendar of Critical Dates, Melissa Fettkether
Wednesday, March 14, 9:00 – Calendar of Critical Dates, Lora Appenzeller-Miller
Thursday, April 5, 9:00 – What Your Agent Should Do For Your - Jester Insurance and Shonna Trudo
Tuesday, May 1, 9:00 – Calendar of Critical Dates, Melissa Fettkether
Thursday, June 7, 9:00 – Calendar of Critical Dates, Brian Gubbels
Tuesday, July 17, 9:00 – Calendar of Critical Dates, Kevin Kelleher

ASBO International - September 22-25 – Denver, Colorado is the site for this year’s annual meeting of ASBO International. ASBO International’s Annual Meeting & Expo will help you face the challenges ahead by fostering new ideas, providing opportunities to expand your professional network, peer-to-peer networking, inspiring keynote speakers, and enlightening skill-building workshops. Make plans now to attend and bring the benefits back to your school district. Registration is available until September 8 at http://www.asbointl.org/meetings/annual-meeting-expo/registration

October 30 Annual Orientation for Beginning School Officials - IASBO will hold the annual New Member Orientation on Wednesday, October 30 at the Prairie Meadows Conference Center. This full day session is designed for those individuals early in their responsibilities as School Business Officials and Board Secretaries. The purpose is to provide new business officials with some basic knowledge and also to begin developing a professional network of experienced individuals upon whom they can call for advice and direction. Orientation is a requirement for those members holding the Initial or Temporary SBO Authorization. Those individuals must attend one Orientation in the two year training schedule.

Sessions include Accounting and GAAP Responsibilities, Duties of the Board Secretary/Treasurer, Uniform Administrative Procedures Manual, Legal Considerations for Schools including duties, responsibilities, relationships and ethical protocol prescribed in Iowa Code.

Registration will be available on the IASBO website at www.iowa-asbo.org. Please contact Nancy Blow at iowaasbo@gmail.com or 319-931-1833 if you have questions.
IASBO Fall Conference – October 31 and November 1 – The IASBO Fall Conference will be held at the Prairie Meadows Conference Center in Altoona on Tuesday, October 31 and Friday, November 1. IASBO recommends inviting the person in your district with the focus of Human Resources duties to this conference. There will be sessions specifically directed to the HR people. Plan to attend for a full slate of Professional Development opportunities. Many sessions will be offered for SBO Authorization Renewal Credit. The Johnny Holm Band will be returning for the Tuesday evening social event. Registration is on the IASBO website. Additional information on sessions can be found in a separate Newsletter article.

Fall and Winter Regional Webinar Meetings - November 7 and February 7- IASBO will hold the annual Regional Webinar meetings. The two hour webinar session in November will offer professional development on the upcoming negotiations season. Ann Smisek and Aaron Hilligas, Ahlers Attorneys, will be the presenters. The February session will be the Aid and Levy/Certified Budget update. John Parker from the Department of Management will be the presenter. The sites selected by each Region will be posted on the website and sent out by email notification. Registration is not necessary. Members may attend the site closest to them. This is a great opportunity for face-to-face networking with peers. These Professional Development sessions will each offer 2 hours of SBO Authorization Renewal Credit.

New Member Budget Training – January 25, 2018 - Patti Schroeder, IASB Finance Support Director, will teach the Certified Budget Process. This full day workshop is designed for the SBO going through their first Certified Budget process. Patti will walk through the Aid and Levy and other Certified Budget forms step by step to help you gain an understanding of where those numbers and calculations come from. You will come away with a new vocabulary that will help you complete your District’s Certified Budget. Registration will be available on the IASBO website. This course is required for those with the Initial/Temporary SBO Authorization. You must attend one New Member Budget Training in your two year program.

2018 Spring Conference, Annual Meeting and Trade Show - Mark your calendars for March 28-29.

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August 16, 2017

Kevin Kelleher, Iowa ASBO President, and Board of Directors

This note is to formally submit my resignation as Executive Director of Iowa ASBO. The decision has been arrived at with considerable emotional difficulty. My tenure with IASBO has been an important part of my professional and personal life as a member since 1987, President in the mid-90s and Executive Director since 2002. I feel considerable satisfaction regarding the many positive advances made by the Association during the past 15 years with the fulfillment of the SBO authorization as the single biggest endeavor to enhance the profession and ultimately the service to the public.

I will sorely miss regular communications with the many people I have had the privilege to get to know in Iowa ASBO as well as many Executive Directors in the other ASBO state affiliates, especially the Iowa ASBO presidents with whom I have worked most closely and at the very top of the list, Nancy. They have come to be thought of as my extended family.

While I am pleased with the past accomplishments I feel it is time to hand off the baton to someone else to pursue major projects that should be addressed in the coming years. As we all well-know, the person who initiates projects has an internal force to see them become effective and successful more-so than when handed something developed by others.

The effective date of the resignation is January 31, 2018 to allow sufficient time to review and implement the existing succession / transition plan. I look forward to continue as a positive force in the ensuing months and welcome any dialogue that may assist in a smooth transition as well as being open to discuss any future assistance.

With satisfaction of the past and positive anticipation for the future,

James R. Scharff, Ph.D.
Father of modern-day password regrets original guidance

The following is from CBS News, and *Mashable* a global, multi-platform media and entertainment company.

Formulating strings of numbers, letters and symbols into passwords is a fact of modern-day life, although not a particularly popular one, and now we are being told we’ve been doing pa$$w0rds all wrong.

Fourteen years ago, writing the official guidance for government employees, Burr suggested picking random combinations and changing them often and now count Bill Burr among the bothered. "Well it frustrates everybody, me included," he said -- really something when you consider Burr is the father of the modern-day password. "I have maybe 200 passwords. I can't remember all those obviously," he said.

But it turns out something like "SOMETHINGLIKETHIS" is a lot harder to hack than something like "80&3T4!*G$\#ET415" or a similarly long string of random characters.

"It's probably better to do fairly long passwords that are phrases or something like that that you can remember than to try to get people to do lots of funny characters," Burr said. So a couple of months back, the guidelines were rewritten to reflect the discovery. Burr is now retired, but he helped out.

But here's the thing: It turns out that the "strong" password requirements we've all come to know aren't actually helping. In fact, they may be doing more harm than good.

This news was first brought to attention in May when experts at the National Institute of Standards and Technology (NIST) issued a draft report challenging many of our long-held assumptions about what makes a good password (what it calls a "memorized secret"). That draft was finalized in June, and it provides a comprehensive list of do's and don'ts when it comes to password hygiene.

And while that NIST recommendation keeps some of the old favorites, it also packs a few surprises.
The do's:

• Make your password at least 8 characters long. We knew this one already, and the basic advice to avoid short passwords hasn't changed. "Passwords that are too short yield to brute force attacks as well as to dictionary attacks using words and commonly chosen passwords," the NIST guidelines remind us.

• Consider making it even longer. Have you ever had a password rejected because it was too long? Yeah, that's a bonkers thing that happens sometimes. The folks at NIST want to change that, and say that service providers should allow passwords of up to 64-characters in length. Take advantage of this and choose long passphrases to protect your accounts.

• Keep your password as long as you'd like (within reason). Say goodbye to forced password resets every 90 days or so. Haven't been notified of a breach, or clinked on any shady links? Feel free to keep your password as it. Things get weird? Well then that's when you should change your password.

• Use a password manager. Password managers, like LastPass, allow you to have robust and unique passwords for each and every site. Use one — it's worth it.

The don'ts:

• Throw out those special characters. Forget all the @'s, $'s, and &'s that you've come to accept as standard password requirements. You don't need those anymore. They just make it harder to remember your actual password, and they don't actually make it stronger.

• Get rid of password hints. Password hints are trouble, as they make it easier for a stranger to guess their way into your account. Don't use them.

• Stop it with the password reset questions. Answers to questions like "what was the name of your first pet" are hardly state secrets, and yet that's all some services require for a password reset. Skip these when possible.
• Avoid the "1234567" trap. Stay away from what NIST refers to as "repetitive or sequential characters." That means your password of "fffffff" has to go, too.

• Making your password the name of the service? Yeah, no. If the password for your Gmail account is "yournameGmail" then you’re doing it wrong. Don’t put the name of the service, your name, or any derivation thereof in your password. Got it?

Following this advice will benefit you in two ways, both by making it easier to remember your passwords and making them stronger. It's a rare and wonderful thing when taking your medicine actually tastes good, and yet that's the exact situation here.

So embrace the new NIST guidelines, because when it comes to digital security they're the rare bit of good news.

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**How soft skills can set you apart**

*BY SARAH SIPEK - CAREERBUILDER*

It’s true that technical skills — or hard skills — are essential qualifications for a job, but they’re not the full story. Contrary to technical skills that focus on what you know, soft skills focus on how you interact with others. They are loosely defined as transferable skills, interpersonal skills or social skills.

They are often multifaceted, but at the end of the day they build relationships — and in business, relationships are key to success. Here are a few soft skills employers identify as most important — and most likely to get you ahead at your job.

**Communication**
It may seem overstated, but the ability to communicate with colleagues sets you apart in the workplace. Organizations are looking for people who can make things happen that usually take a team, not just one person.”

Communicating is about more than just being personable and outgoing. It’s about bringing up the right points at the right time. It is the end result of many other soft skills — most important of which is critical observation. Objectivity and
divergent thinking — along with good communication — is what will allow you to stand out from the crowd in a good way.

**Ability to handle criticism**
Giving and receiving criticism in a helpful, ego-less way sets you apart. You are not always going to perform perfectly. In order to grow within an organization, you need to have the ability to hold an open and honest dialogue about your strengths and weaknesses.

Being able to self-reflect and grow as a professional through constructive criticism is a great way to impress any employer. And when you're receiving criticism, body language is key. Refrain from crossing your arms or slumping your shoulders. Avoid accidental eye rolls as well. These behaviors imply you are not a willing participant in the professional development process.

**Attention to detail**
Accomplishments are great, but soft skills are how those accomplishments come to fruition.

For example, when adding bullet points to your resume, go beyond the "what' and explain the "how." If you recovered $1 million in lost revenue, don’t assume the number alone will distinguish your efforts. Write, “Recovered $1 million in lost revenue through attention to detail and meticulous review of 750 accounts,' to highlight the soft skills you used to accomplish that goal.

Employees considered first when a promotion opportunity presents itself are those who are attentive to detail, take initiative to solve problems and are committed and invested into the success of all those with whom we work.

**Positive attitude**
When disaster strikes, people who radiate positive energy and search for solutions rather than dwell on the technical details of the problem come out ahead when the problem is solved.

People who lack this soft skill tend to overanalyze all the reasons why something bad happened, rather than moving forward and doing everything that they can to mitigate and get things back up and running smoothly.

Issues will always arise at work, but the ability to handle them with grace and composure shows your boss you have leadership potential.

**Time management**
It seems cliché, but the ability to divide your time and complete projects on-time is an in-demand skill among employers. Not only will meeting deadlines help your district achieve its goals, it will also set you apart as reliable. People who have a strong understanding of what needs to get done and how long it will take to complete often excel at securing raises and promotions because they demonstrate a fundamental understanding of the district’s mission and work to fulfill it.

Sarah Sipek is a writer for the Advice & Resources section on CareerBuilder.
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School Election Dos and Don’ts and Certification Election Updates

By: Danielle Hainfield, Carrie Weber & Aaron Hilligas

Ahlers & Cooney, P.C.

School Election Dos and Don’ts

As school elections approach, school boards and school employees should be aware of the limitations on advocating for any particular ballot issue or school board candidate. Iowa Code provides:

The state and the governing body of a county, city, or other political subdivision of the state shall not expend or permit the expenditure of public moneys for political purposes, including expressly advocating the passage or defeat of a ballot issue.

This section shall not be construed to limit the freedom of speech of officials or employees of the state or of officials or employees of a governing body of a county, city, or other political subdivision of the state. This section also shall not be construed to prohibit the state or a governing body of a political subdivision of the state from expressing an opinion on a ballot issue through the passage of a resolution or proclamation.

Iowa Code § 68A.505. This statute provides the boundaries that define the appropriate conduct of governing officials and employees once the Board has accepted the petition and called the election.

Sorting out exactly how this applies can be confusing. It is clear that public funds cannot be used to support or oppose a bond issue, a particular candidate for school board, or any other ballot issue. However, a public body that decides to place a proposal before the voters will have gone through an extensive process for deciding, for example, that the project or proposal is needed. Nonetheless, material prepared and distributed by the governing body must be informational only and not advocate a particular vote on a ballot issue. For example, the school board may use public funds to distribute a pamphlet that describes “the reasons for construction, needs, plans, and anticipated costs” with respect to a bond issue. Leonard v. Iowa State Board of Education, 471 N.W.2d 815 (Iowa 1991). But the pamphlet must not advocate a “yes” or “no” vote. Id. A governing body may, however, express an opinion on a ballot issue through the passage of a resolution or proclamation. Iowa Code § 68A.505.

In contrast, individual school board members and school employees are permitted to participate in activity that explicitly promotes or opposes a candidate or ballot issue, so long as those individuals do not do so in their official capacity and do not expend public funds in the process. If an individual school board member or employee chooses to participate in advocacy or opposition for a candidate or ballot issue, the individual should make clear whenever possible that they are not representing the school district in an official capacity, and that all opinions are their own as individuals.
One strategy to assist in the education process for a particular ballot issue is the formation of a private citizen’s election committee that can promote a particular issue without the restriction on use of public funds. The activity of these organizations is regulated by the Campaign Finance Disclosure Act, Iowa Code chapter 68A, as well as the Iowa Ethics and Campaign Finance Disclosure Council which has promulgated rules governing the operation of campaign committees.

One important distinction between ballot issues and the election of individuals to public office is that corporations may contribute to a ballot issue campaign, but not to the campaigns of individual candidates. See Iowa Code § 68A.605.

When a campaign committee is formed, it is important that proper procedures be followed. Persons who hold responsibility for filing reports, preparing advertising materials and other activity must comply with the statutes and rules to avoid negative publicity as well as being subject to reprimands or fines.

Finally, be cautious about members of the school board who choose to participate in a citizens’ committee in their individual capacity. The open meetings law (Iowa Code Chapter 21) may be applicable if a quorum of school board members is present at any meeting of a citizens’ committee. This should be avoided to ensure that no violations of open meetings law occurs.

The following are practical examples of permissible and impermissible conduct for school board members, school officials, school employees, and students during working hours, at District-sponsored events, and when using District resources and facilities:

School Board Members, School Officials, and School Employees CAN:

- Urge students, parents, or teachers to vote, as long as they don’t advocate how or for whom to vote.
- Inform students, parents, or teachers about the ability to vote absentee, as long as they don’t advocate for voting absentee over voting on election day.
- In their individual capacity, wear a button supporting or opposing a ballot issue or candidate, as long as it is not prohibited by District policy. The District can neither encourage nor discourage employees from wearing buttons.
- In their individual capacity, attend a PTA meeting and speak in support or opposition to a ballot issue or candidate. The District employee must make clear that they are not acting on behalf of the District, and that any opinions are their own.
- Allow members of the public to distribute materials advocating or opposing a ballot issue or candidate on District property, including but not limited to open houses, but only if such distribution is consistent with District policies, rules, and regulations. For example, a school district can make reasonable rules to limit distribution to outside of school buildings and outside of school time. Any school board policy on the distribution of materials or literature should be content-neutral and should cover a range of topics from religious material to campaign literature. As long as the material is not created with public funds, including developed by school employees during work hours or distributed by school employees during work hours, the distribution does not violate the law.

School Board Members, School Officials, and School Employees CANNOT:

- Wear t-shirts supporting or opposing a particular ballot issue or candidate—most districts have policies against shirts with political messages, advertising, or logos.
- Sponsor a poster contest or essay contest supporting or opposing a ballot issue or candidate as part of an assignment for students.
- Urge other employees at a work-related meeting during working hours to vote for or against a certain ballot issue or candidate.
- Use District telephone, e-mail, fax, or website to support or oppose a ballot issue or candidate. This would be an improper use of public funds. NOTE, however, that outside campaign emails may be received by school officials or employees at their public email addresses without there being a violation. If, however, that employee were to forward onto others an outside email that was received on their school account, that conduct would be a violation.
- Allow campaign volunteers to use District property to operate a phone bank, poll voters, solicit funds, or support or oppose a ballot issue or candidate. This is prohibited by Iowa Code § 721.2(8).
• Allow any organization or candidate to support or oppose a ballot issue or candidate in a school-sponsored newsletter, unless it is an advertisement in a District publication that generally accepts third-party advertisements. In addition, if the school board regularly uses the newsletter to communicate its business, the newsletter can include a report on the Board’s action, including whether the Board passed a resolution advocating for or opposing a particular issue. However, the newsletter cannot further advocate for any particular position. A newsletter may also be used to advertise the public date of the election and the voter registration deadline.
• Allow any organization or candidate to hang signs supporting or opposing a ballot issue or candidate on a District parade float, or to participate in a District parade entry in any way.
• Allow, in most instances, the sending home of information provided by any organization supporting or opposing a ballot issue or candidate through the District’s mail system, email, or by staff distributing material directly to students. If questions on this particular issue arise, we recommend seeking advice from legal counsel.

Students CAN:

• Openly advocate or oppose a ballot issue or candidate during school hours, through speech or distributing material, as long as it is consistent with District policies, rules, and regulations governing student speech.
• Wear a button or t-shirt advocating or opposing a ballot issue or candidate as long as the button or t-shirt does not conflict with District policies, rules, and regulations.

Union Certification Elections

PERB Emergency Rules Regarding Union Retention and Recertification Elections

The Iowa Public Employment Relations Board (PERB) drafted emergency administrative rules addressing union retention and recertification elections created by the February 17, 2017 amendments to Chapter 20. These rules were approved by the legislative Administrative Rules Review Committee on August 4.

PERB’s draft emergency rules contain several provisions of relevance to public employers, including:

Employers Must File Collective Bargaining Agreements with PERB

Section 20.29(2) of the Iowa Code requires that public employers file a copy of a collective bargaining agreement with PERB within ten days of entering into the agreement with the union. If an employer fails to file a collective bargaining agreement with PERB, the agency will presume the maximum permitted duration of an agreement for the purposes of scheduling a retention and recertification election (five years for most units) unless the employer subsequently submits a collective bargaining agreement that allows PERB to conduct an earlier election.

Employer Obligation to Provide Voter Eligibility Lists to PERB

Chapter 20 of the Iowa Code now requires retention and recertification elections prior to the expiration of a collective bargaining agreement to determine if the bargaining unit employees wish to continue to be represented by the certified representative. For collective bargaining agreements with a June 30 expiration date, an election must be held not earlier than June 1 or later than November 1 in the year prior to the expiration of the agreement.

The first step of the retention and recertification election process involves PERB’s determination of whether an election is required. It makes this determination by reviewing its contracts on file, and examining which will expire within the
next year. **It is therefore imperative that public employers ensure that their current contracts are filed with PERB as described above.** When PERB determines that a contract is set to expire, the agency will email notice of intent to conduct an election (“Notice of Intent”) to the employer and union.

Within seven days of PERB filing the Notice of Intent, an employer must email to PERB an alphabetical list of all eligible voters (“eligible voter list”). Eligible voters are defined as: employees employed in the bargaining unit during the payroll period immediately preceding the direction of election and those who are employed in the bargaining unit on the date of the election. The list provided by the employer must contain the following information: **Employee Name; Job Classification; Address; Work Email Address; Other Known Email Address; Last Four Digits of Social Security Number; and Date of Birth.**

Employers must also email to PERB any additions or deletions of employees or changes in job classifications or addresses to reflect the current status of eligible voters after it initially emails the list to PERB.

**It is critical that employers timely provide PERB with the eligible voter list.** Under PERB’s emergency rules, an employer’s failure to do so may result in PERB refraining from conducting the election, filing an order recertifying the union without an election, and requiring the employer to reimburse the agency or union for the election costs already incurred. If an employer believes a notice of intent for an election is in error because a contract is not scheduled to expire, the employer should promptly call PERB to ensure that the current contract is filed with PERB and contact legal counsel.

**Employer Obligation to Post and Circulate Election Notice**

After the union pays the applicable election fee to PERB in response to the agency’s Notice of Intent, PERB will file a Notice of Election. This Notice of Election will be provided to the employer electronically and will contain: information about how an employee is to vote, a sample ballot or script, the dates of the election period, the time, place, method, and purpose of the election, and other information deemed appropriate by PERB. The employer is required to post the contents of the Notice of Election in the manner and in locations customarily used by the employer for the timely distribution of information to its employees. **For example, if an employer customarily distributes information to employees via email or by hard copy, it should also promptly distribute the notice to employees by those means unless doing so is unworkable due to timing.**

Following the election period, results will be sent to the parties electronically and posted on PERB’s website. If a majority of the employees in the bargaining unit do not vote to retain and re-certify the representative, the representative is immediately decertified and the employees are barred from seeking a new representative for two years. In addition, any current contract becomes unenforceable.

**Ambiguity Regarding the Premature Extension of Existing Agreements**

It is our understanding that some unions may try to avoid the requirement of a retention and recertification election by attempting to convince employers to prematurely extend a current collective bargaining agreement. The emergency rules state that an election will be held every five years regardless of any extension agreements. However, it is unclear how this rule will be applied to premature extensions of already-existing agreements. Employers should be very cautious and seek legal advice if contacted by a union representative about extending a contract in order to avoid an election.

**Retention and Recertification Schedule**

PERB has made a tentative schedule for conducting its first round of retention and recertification elections. If you have a collective bargaining agreement scheduled to expire June 30, 2018, note the following important dates:

**August 22, 2017:** PERB electronically serves notice of intent to conduct an election to employers and unions with contracts that expire on June 30, 2018.
August 29, 2017: Deadline for employer to email PERB the list of employees eligible to vote, along with the additional information required by PERB listed above.

September 11, 2017: Deadline for the employee organization to pay for the election or request an extension to pay.

October 10-24, 2017: Election period during which employees may cast their votes for or against continued representation.

Best Employer Practices Relating to Election Conduct

The reality is that the union retention and recertification elections brought about by the changes to Chapter 20 will be the first PERB-conducted election many public employers have encountered in decades. We have prepared a brief summary outlining the type of conduct that employers and supervisory employees can and cannot engage in related to retention and recertification elections:

During Retention and Recertification Elections, Employers and Supervisory Employees CAN:

- Inform employees of their rights under the law
- Clarify false or misleading statements
- Advise employees to contact PERB for more information
- Encourage employees to vote freely

During Retention and Recertification Elections, Employers and Supervisory Employees CANNOT:

- Discipline employees for union activity
- Treat pro-union and non-union supporters differently in the workplace
- Prohibit an employee who is campaigning for or against the union from doing what other employees are permitted to do (such as campaigning during non-work time in non-work areas)
- Ask employees about confidential union matters
- Ask employees about their support/opposition to the union
- Threaten or coerce employees
- Promise a reward/future benefit
- Make a prediction of future conduct based on the election result
- Use documents to indicate endorsing a specific choice on the election ballot
- Make campaign speeches to groups of employees during work hours in the 24 hours prior to the election

The purpose of this column is to identify issues. It does not purport to be exhaustive or to render legal advice. You should consult with qualified counsel or other professionals in developing responses to specific situations.

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Iowa ASBO Dates to remember:

September 22–25, 2017 - ASBO Intl - Denver, Colorado

Oct 31 – Nov 1, 2017 (T-W) - fall conference, Meadows Conference Center, Altoona, Iowa

March 28-29, 2018 – (W-Th) Annual Meeting & Trade Show, Scheman Center in Ames, Iowa

September 21–24, 2018  ASBO Intl - Kissimmee, Florida

Iowa’s Ed Chabal installed as ASBO Intl Vice-President????

October 30-31, 2018 (T-W) – fall conference, Meadows Conference Center, Altoona, Iowa

March 27-28, 2019 – (W-Th) Annual Meeting & Trade Show, Scheman Center in Ames, Iowa

September 24-25, 2019 – (T-W) fall conference, Meadows Conference Center, Altoona, Iowa

October 25–28, 2019  ASBO Intl - National Harbor, Maryland (immediately south of D.C.)

October 2–5, 2020 - ASBO Intl - Nashville, Tennessee

Iowa School Business Management Academy Dates to Remember

May 10-12, 2017 - Scheman Center in Ames, Iowa
April 25-27, 2018 - Scheman Center in Ames, Iowa
May 1-3, 2019 - Scheman Center in Ames, Iowa