

## MEMORANDUM

**TO:** Legislative Oversight Committee

**FROM:** Iowa Association of School Boards

**DATE:** January 24, 2011

**SUBJECT:** IASB

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The initial correspondence from the Committee's staff scheduling this meeting asked that we provide certain information to the Committee. Enclosed you will find our answers to the questions contained in the staff's letter to IASB.

1. Known Status of Investigations

- a. IASB has been informed by Special Agent Kevin Kohler of the Federal Bureau that the results of his investigation were shared with the United States Attorney. The U.S. Attorney, upon review of the evidence, found that there was no Federal violation. The results of the FBI investigation were turned over to the Polk County Attorney.
- b. IASB has been informed by Eric Tabor of the Iowa Attorney General's office that their criminal investigation has been closed. Mr. Tabor advised that his office was concerned by the salary increases granted by the former Executive Director, however they were comforted by the corrective actions taken by the new administration and that no action will be taken concerning IASB's nonprofit status.
- c. We contacted the Polk County Attorney's office and they would only advise that they were studying the evidence and would probably make a decision before mid April. They could not share any other information concerning their investigation.

- d. The State Auditor has recently reviewed certain LWBJ and Brooks Lodden work papers and IASB records. We have not received any conclusions from the Auditor's office.

## 2. Open Meetings and Open Records Compliance

On the 12<sup>th</sup> of January, 2011, the IASB Board adopted the position that pursuant to a valid request, it would release all records, including pre-July 1, 2010 records, with the sole exceptions being those that are consistent with exceptions provided to K-12 boards of education. The records that we feel should remain confidential are as follows:

- a. Legal issues that carry attorney-client privilege;
- b. Questions or communications from local districts related to local district personnel questions, legal issues, or student issues;
- c. Negotiations related to business services that provide revenues to support member services; and
- d. IASB internal personnel information that would be confidential in a local school district.

Prior to the enactment of S.F. 2376 on July 1, 2010, IASB was under no legal obligation to allow public inspection of its records under the requirements of the Chapter 22 Iowa Open Records Law. Therefore, each of IASB's six subsidiaries and affiliated entities had the reasonable expectation that any written documents provided by it to IASB prior to July 1, 2010, would not be subject to Iowa Open Records Law disclosure. IASB employees and representatives, both past and present, likewise had the reasonable expectation that any written documents provided by them to IASB prior to July 1, 2010, would not be subject to Iowa Open Records Law disclosure.

The requirement of S.F. 2376 to subject IASB to the public records inspection provisions of the Chapter 22 Iowa Open Records Law has raised significant issues of confidentiality. First, past and present IASB employees, representatives, subsidiaries and affiliated entities may have legitimate legal objections relating to public disclosure of documents that they provided to IASB before the Iowa Legislature chose to first make IASB subject to the Iowa Open Records Law.

Second, even if those individuals and entities are found to have no legal rights to prevent disclosure in general of their documents under the Iowa Open Records Law, those individuals and entities may be able to identify exceptions to disclosure of particular identified documents under the Section 22.7 listing of confidentiality exceptions to the general disclosure requirements. Therefore, IASB exposes itself to potential liability to any of these individuals and entities whenever it voluntarily makes their documents in its possession available for public inspection pursuant to an inspection request from a requesting party made under Chapter 22.

While, IASB is exposed to potential liability for wrongful public disclosure of confidential documents, it is very important to recognize that IASB also is exposed to liability for refusing to disclose documents that are not protected against Chapter 22 disclosure. Iowa Code Section 22.10 authorizes lawsuits for enforcement of the rights under Chapter 22. Section 22.10(3) provides that, upon a finding by a preponderance of the evidence that a lawful custodian is in violation, a court must order injunctive relief, must assess to any person who participated in the violation damages of not more than \$500.00 and not less than \$100.00, and must order payment to the successful plaintiff of all costs and reasonable attorney fees, including appellate attorney fees. Section 22.10(5) further provides that “[j]udicial enforcement under this section does not preclude a criminal prosecution under section 22.6 or any other applicable criminal provision.” Pursuant to Iowa Code Section 22.6, if a government body knowingly denies any member of the public the right to examine and copy public records provided under Chapter 22, the body is guilty of a simple misdemeanor.

Because of its significant exposure to liability for making the wrong decision as to whether or not to make documents available in response to public requests for inspection under Iowa Code Chapter 22, IASB will notify any past and present IASB employees, representatives, subsidiaries and affiliated entities of any Chapter 22 public requests for any documents relating

to a particular individual or entity. Along with the notification, IASB will ask the individual or entity to specifically identify each document that the individual or entity asserts is confidential and protected from disclosure under Chapter 22. The individual or entity also will be asked to cite any of the statutory exceptions protecting a document from disclosure within the listing under Iowa Code Section 22.7, as well as state any other reasons why disclosure should not be made.

After receiving the responses from each of the affected individuals or entities, IASB will review and evaluate any issues raised as to the confidentiality of any requested document and make such response as IASB deems appropriate to the requesting party.

### 3. Repayment by Current and Former Employees of Salary Increases

- a. The Audit report reflects that LeGrande Smith, former General Counsel, in November 2009 received a \$20,800 per year salary increase which was retroactive to July 1, 2009. Mr. Smith has repaid the salary benefits and interest totaling \$15,312.69 in full.
- b. Dr. Maxine Kilcrease was hired by IASB effective July 1, 2009, at a salary of \$210,000.00 per year. The audit reflects that on or about September 30, 2009, without board approval, Dr. Kilcrease's salary and benefits were increased and during the period from September 30, 2009 to April 2, 2010 when her employment was terminated, she allegedly received \$111,579.46 in additional income. Dr. Kilcrease repaid \$59,192.84 on March 3, 2010. Demand has been made for the balance but nothing further has been repaid. The IASB board will review collection options at its March 2011 meeting.
- c. The audit reflects that Dr. Mary Delagardelle received a salary increase in November 2009, which amounted to excess benefits in the total sum of \$29,854.26. Demand has been made for the repayment of said sum and Dr. Delagardelle have disputed the fact that said increase amounts to excess benefits. The board will review its collection options at the March 2011 meeting.

- d. The audit reflects that Kevin Schick had \$1,216.61 in corporate credit card charges where there was no documentation establishing that the charge was for business purposes. In addition Mr. Schick billed IASB \$800.00 for time that he claimed he was at work, but it has been determined he was in Bora Bora. Mr. Schick's attorney has been contacted and requested to provide receipts for all credit card charges. The board will review its collection options at the March 2011 meeting.

#### 4. Remedial Actions of the IASB Board

- a. Audit Committee: That on the 25<sup>th</sup> of April, 2010, the President appointed an Audit Committee known as an Audit/Finance Committee. The said committee shall meet at least quarterly with the external auditors. (See Code 112 attached hereto and marked Exhibit A).
- b. Compensation and Benefits Committee: The President has appointed a Compensation and Benefits Committee which shall review and recommend to the Board salary and benefits to be paid to IASB employees. (See Code 114 attached hereto and marked Exhibit B).
- c. Governance and By-Laws Committee: The President has appointed a Governance and By-Laws Committee which will consider and recommend best practices for the governance of the Association. (See Code 115 attached hereto and marked Exhibit C).
- d. Amendment to Salary and Wages Policy: That on the 25<sup>th</sup> of April, 2010, the IASB board amended a policy that now requires the Board to approve all annual and interim salary adjustments. (See Code 203.1R3 attached hereto as Exhibit D).
- e. Employee Benefits Policy: That on the 14<sup>th</sup> of July, 2010, the IASB board amended the Employee Benefits policy. (See Code 203.1R10 attached hereto as Exhibit E).
- f. Credit Card Policy: That on the 25<sup>th</sup> of April 2010, the IASB board amended and tightened its credit card policy. (See Code 203.1R19 attached hereto as Exhibit F)
- g. Travel Expense Policy: On the 25<sup>th</sup> of April, 2010, the IASB board amended the travel expense policy (See Code 201.1R15 attached hereto as Exhibit G).

- h. Deposit/Investment of Funds Policy: On the 12<sup>th</sup> of May, 2010, the IASB board amended the Deposit/Investment of Funds policy. (See Code 204.1R2 attached hereto as Exhibit H).
- i. Policy for Examination or Copying of Records: Said policy was adopted April 25, 2010 and amended July 14, 2010. (See Code 113 attached hereto as Exhibit I).
- j. Skills Iowa Questions and Answers: General Questions and Answers concerning Skills Iowa. (See Exhibit J attached hereto).

### **Audit Committee**

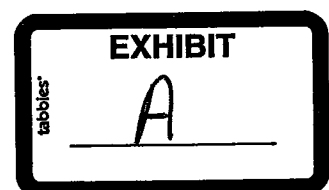
The Audit Committee shall be comprised of the president, president-elect, treasurer and two other members appointed by the president and approved by the board.

The Audit Committee shall have the responsibility to oversee the IASB's financial reporting processes, monitor the accounting policies and principals, monitor internal control processes, with assistance of the external auditors and management, monitor the annual audits and any changes required in the auditing plan, and oversee the hiring and performance of the external auditors. The Audit Committee shall make recommendations to the Board on agenda items related to the above topics.

The Audit Committee shall meet at least quarterly with the external auditors and the minutes of said meetings shall be reported to the Board of Directors.

The Audit Committee shall elect a member of the Committee to serve as Chair.

Adopted: April 25, 2010



## Compensation and Benefits Committee

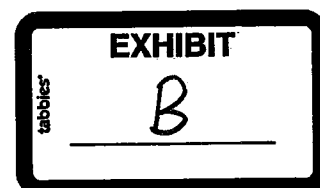
The president shall appoint a Compensation and Benefits Committee comprised of five IASB board members. The Executive Director and Chief Financial Officer shall be ex officio members of the committee.

The Committee on Compensation and Benefits shall:

- Advise the board on all matters pertaining to the compensation and benefits for Association employees to ensure that compensation and benefit policies, procedures, programs and practices are fair, effective, clear, comprehensible, transparent and accountable, and inspire the trust of the education community and the public.
- ~~Periodically~~The committee shall recommend to the board, at least every five years or sooner, if the committee deems it necessary, an external study of salaries and benefits be authorized to engage persons to examine the competitiveness of the compensation and benefits for the staff.
- On at least an annual basis recommend to the board the compensation and benefits to be paid to all employees of the Association.
- Consider and recommend to the board on matters concerning employee welfare benefit programs including reports and recommendations presented by the executive director of the Association relating to retirement of Association employees.

The Committee shall elect a member of the Committee to serve as Chair.

Adopted:





## Governance and By-Laws Committee

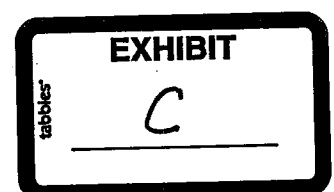
The president shall appoint a Governance and By-Laws Committee comprised of five IASB board members. The Executive Director and Director of Policy Services shall be ex officio members of the Committee.

The Governance and By-Laws Committee shall:

- Consider and recommend best practices for the governance of the Association.
- Review and evaluate the effectiveness of existing By-Laws, policies and regulations of the Association on an annual basis and recommend changes to the board.
- Consider and recommend to the board changes in meeting format that will increase the transparency of the Association.
- Consider and recommend to the board policies relating to committee service and specialized expertise that might assist specific committees.

The committee shall select its chair from the membership of the committee.

Adopted:



## Salary and Wages

Upon receiving the recommendation of the Executive Director, the IASB Board of Directors shall determine annually the salary budget and approve the salaries for all staff. The salary budget and staff salaries shall be set at the board meeting at which the general operating budget for the ensuing fiscal year is approved. The executive director's salary shall be approved annually by the board of directors.

The Executive Director may recommend interim salary adjustments within the salary budget established by the IASB Board of Directors. Conditions for a recommendation of a salary adjustment shall include a change in employee's qualifications to perform assigned tasks, a change in an employee's assignment or other good cause. All changes shall be approved by the Board to be effective.

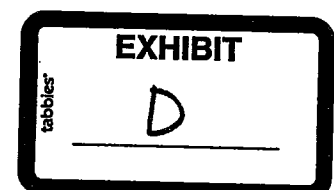
### **Salaried Staff**

The IASB Salaried Staff includes all employees who use independent judgment to perform professional/program services for the Association. Such employees are exempt from the U.S. Wage and Hour Law. Performance of these duties may require that salaried employees work beyond regular office hours.

### **Non-Salaried Staff**

All non-salaried staff will be paid an hourly wage. These employees are covered by the U. S. Wage and Hour law. Overtime pay will be provided for hours beyond a forty-hour week. Any overtime must be approved in advance by the Executive Director, Director of Finance or respective Associate Executive Director.

Adopted: November 22, 1985  
Revised: September 21, 1988  
Revised: September 27, 1990  
Revised: July 1, 1993  
Revised: November 20, 1998  
Revised: January 17, 2001  
Revised: April 25, 2010



## Employee Benefits

The IASB Board of Directors, upon recommendation of the Executive Director, shall provide benefits to IASB staff members and regular part-time employees working 20 or more hours weekly.

Benefits may include:

- Flex I
- Flex II
- Group health insurance/major medical for the employee wellness program
- Life insurance and Accidental Death & Dismemberment for the employee
- Long-term Disability Insurance
- Pension plan
- 401(k) Salary Deferral Program

The IASB Board of Directors shall determine the carrier for all insurance/pension programs. Benefits will be reviewed annually. Benefits provided by IASB shall be available to all eligible employees.

Adopted: November 22, 1985  
Revised: September 21, 1988  
Revised: September 27, 1990  
Revised: July 1, 1993  
Revised: December 1, 2005  
Revised: July 14, 2010



## CREDIT CARDS

Employees may use IASB credit cards for the actual and necessary expenses incurred in the performance of work-related duties. Actual and necessary expenses incurred in the performance of work-related duties include, but are not limited to, meals, travel, pursuant to 203.1R15, publications and professional development materials, conference registrations, and other items necessary for performance of duties. Generally speaking, it would not include items that are routinely purchased by the association such as office supplies.

Employees using a IASB credit card must submit a detailed receipt in addition to a credit card receipt indicating the date, purpose and nature of the expense for each claim item. Failure to provide a proper receipt will make the employee responsible for expenses incurred. Those expenses are reimbursed to IASB no later than ten working days following use of the credit card. In exceptional circumstances, the executive director or chief financial officer may allow a claim without proper receipt. Written documentation explaining the exceptional circumstances is maintained as part of IASB's record of the claim. Employees shall not use their IASB credit card to purchase personal items.

It is the responsibility of the executive director or chief financial officer to determine whether the IASB credit card use is for appropriate IASB business.

Adopted: January 19, 2010  
Revised: April 25, 2010



## Travel Expenses

Expenses for travel in connection with IASB activities shall be reimbursed upon receipt of an approved IASB Travel Expense Report.

IASB shall pay the room, board, and other travel expenses for members of the IASB Board of Directors to attend any meeting of the IASB Board of Directors, Executive Committee, other special committee, and at other times when performing association business, as well as for the annual convention. The provisions of the Travel Expense Reimbursement Procedures shall apply to IASB Board member travel.

IASB Officers shall be reimbursed for expenses incurred when attending meetings relating to their position.

Members of the IASB Boards of Directors are exempt from payment of registration fees for the IASB annual convention and IASB conferences, but are responsible for their expenses to and from IASB conferences/workshops.

Travel costs shall be reimbursed as follows:

**NSBA Convention:**

President (Delegate) -- full expenses; President-Elect (Delegate) -- full expenses; Past President or replacement (Delegate) -- full expenses; Treasurer -- full expenses; Executive Director -- full expenses.

**NSBA Central Region Meeting:**

President -- full expenses; President-Elect -- full expenses; Executive Director -- full expenses

**NSBA State Executive Directors Summer Conference:**

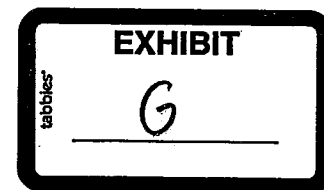
Executive Director -- full expenses

**NSBA State Presidents' Summer Conference:**

President -- full expenses; President-Elect - - full expenses

IASB Staff members shall be reimbursed for all necessary and reasonable travel expenses, pursuant to the Travel Expense Reimbursement Regulation, incurred incident to their regular employment duties and responsibilities.

Expenses for travel in connection with IASB activities shall be reimbursed upon receipt of an approved IASB Travel Expense Report in accordance with the following procedures:



## **Travel Expenses (Continued)**

### **Air Travel**

- Air travel and accompanying association related expenses shall be reimbursed at coach or single class rate. When available, and conditions permit, excursion or other discount rates shall be utilized.
- First class air travel is authorized only if individual circumstances of a serious nature require such travel and the reason for such travel shall be explained on the Travel Expense Claim form (e.g., bad weather, time constraints where lack of coach class space means serious delay, emergencies, etc.).
- If first class travel is utilized but not authorized, only authorized rates may be claimed. If airfare is billed to IASB, appropriate deductions shall be made on expense claim.
- Travel should be by the most direct route.
- Copies of airline tickets shall be attached to claim for substantiation of amounts.
- Any personal travel costs in connection with an IASB-related trip shall be excluded from claim if paid for by person traveling. If IASB is billed for entire cost, appropriate deductions for the personal portion shall be made on the claim.
- Employees may have the travel agency bill IASB directly for airline travel expense.

### **Rail, Bus Travel**

Rail or bus travel is authorized by the most direct route. Reimbursement shall be actual cost. Copies of tickets shall be attached to claim for substantiation of amounts.

### **Automobile Travel**

Personal automobiles may be used for a round trip in the performance of association business. Reimbursement shall be at the standard mileage rate permitted by the Internal Revenue Service at the beginning of the fiscal year. Damages incurred to a personal automobile while on association business will be reimbursed to the level of the insured's deductible, not to exceed \$500.

### **Rental Automobile Travel**

Automobile rentals are authorized and costs shall be reimbursed where the use of such vehicle warrants. An explanation of the reason for such use shall accompany the claim.

## **Travel Expenses (Continued)**

### **Miscellaneous Travel**

- Mileage for use of personal automobile in trips to and from transportation terminals shall be reimbursed at the standard mileage rate. Round trip mileage shall be payable when the claimant is driven to the transportation terminal by another person.
- Toll charges and parking costs shall be reimbursed in full. Receipts where available should be attached to claim.
- Round trip mileage shall be reimbursed at the standard mileage rate for costs of being driven to and/or being picked up at the terminal by someone else.
- Local business mileage shall be reimbursed at the standard mileage rate.  
Out-of-State travel by IASB staff must be pre-approved by the executive director.

### **Hotel/Motel Room Charges**

- IASB shall reimburse for hotel or motel room charges at the single room rate for all IASB-related travel. Included are charges for any rooms utilized en route, if needed.
- Double rooms or suites may be utilized by the President or Executive Director if he/she deems it in the interests of IASB.
- Hotels/motels are authorized one night before and/or one night after a meeting, as travel conditions require.

### **Other Hotel/Motel Costs**

Other expenses billed to hotel room bills will be reimbursed when such expenses are specifically related to IASB activities. This includes telephone costs and food and refreshment on behalf of IASB. Notations as to the type(s) of expense, the reasons for such costs, and affiliation with IASB of those entertained should be shown on the expense claim form or copy of the hotel bill.

### **Meal Charges**

Persons traveling on approved IASB-related business are authorized to claim the actual, reasonable cost of meals consumed. The purchase of alcohol will not be reimbursed and persons with alcohol charges on an IASB credit card will reimburse IASB within 14 days of IASB's receipt of the credit card statement.

### **Other Expenses**

This category covers other expenses for which IASB is responsible.

- Taxis, airport limousines or other local transportation costs in the conduct of IASB business in a city are authorized. Receipts are useful but not mandatory.
- Telephone costs. All business telephone calls, whether charged to hotel bills or paid, are IASB costs and shall be reimbursed. One telephone call per day to the claimant's immediate family is reimbursable.
- Laundry/valet services are reimbursed if travel extends four or more days.
- Food and refreshment costs for entertainment incident to IASB-related activities are reimbursable. The number and names of persons, reasons for such costs and affiliation with IASB of those entertained should be noted on expense claims.

- Reasonable gratuities are reimbursable for services related to expenses that are themselves specifically reimbursable under this policy. For example, gratuities for waiters, skycaps, taxi drivers and bellboys at the time of check-in or check-out may be claimed.

**Travel Expenses (Continued)**

- Other expenses directly connected with travel as defined and approved by the Executive Director.

**Travel Advance**

Advances up to \$350.00 may be paid to cover travel expenses. The person receiving an advance will account for all expenses and reimburse the association for any unused portion as soon as possible upon return from the business trip for which the advance was requested.

**Entertainment/Business-Related Expenses**

Expenses incurred by IASB employees shall be reimbursed when there is a direct relationship to IASB activities.

Adopted: November 22, 1985  
Revised: September 27, 1990  
Revised: January 15, 1998  
Revised: January 17, 2001  
Revised: March 30, 2004  
Revised: January 19, 2010  
Revised: April 25, 2010



## Deposit/Investment of Funds

It is the responsibility of the IASB Board of Directors to invest funds of the Association in investments allowed for Iowa public agencies and as set forth in the Depository and Investment of Funds Resolution adopted by the IASB Board of Directors.

### Restated Resolution

BE IT RESOLVED, That the Bankers Trust Company, WB Capital, and Merrill Lynch be hereby designated as the depository banks for funds of this company in a checking account, savings account, certificates of deposit, and/or other investment instruments; and that it shall be permissible to make such deposits in amounts not to exceed \$8,000,000.00, provided that said funds on deposit shall, insofar as possible, be covered by regular and ordinary depository insurance.

BE IT FURTHER RESOLVED, That idle funds may be invested in savings accounts and certificates of deposits of banks, savings and loan institutions, and other financial institutions, provided that such certificates of deposit are covered by regular and ordinary depository insurance; and in other investments authorized under Section 12B.10(5), 2009 Code of Iowa. The treasurer shall review the investments made pursuant to this resolution.

BE IT FURTHER RESOLVED, That the authorized individuals to sign checks against said accounts shall be Veronica Stalker, Executive Director, or Harry Heiligenthal, Director of Leadership Development. Withdrawal orders against savings accounts, certificates of deposit, or other financial investments shall be upon the signature of Veronica Stalker, Executive Director, or Harry Heiligenthal, Director of Leadership Development.

Revised: November 1993  
Revised: July 1987  
Revised: July 1995  
Revised: July 1996  
Revised: January 18, 2001  
Revised: January 27, 2003  
Revised: April 12, 2006  
Revised: May 12, 2010



**INTERNAL CONTROL RESOLUTION**

WHEREAS the Iowa Association of School Boards maintains multiple accounts at several depository institutions, and

WHEREAS periodically there are times when funds are to be transferred by and between Iowa Association of School Boards, Local Government Services, and the Iowa School Board Foundation, and

WHEREAS with the resignation of the Association's Treasurer, Bill Morain, it is appropriate that replacement officers be designated and authorized to initiate funds transfers.

NOW THEREFORE BE IT RESOLVED that any two of the following Officers: President, Executive Director, Chief Financial Officer, Treasurer, and Leadership Development Director of the Iowa Association of School Boards are authorized to approve the transfer of funds into or out of the Association's accounts, certificates, and investments under Section 12B.10(5) 2009 Code of Iowa.

PASSED AND APPROVED this \_\_\_\_\_ day of June, 2010.

IOWA ASSOCIATION OF SCHOOL BOARDS

By: \_\_\_\_\_  
Russell Wiesley, President

Attest:

\_\_\_\_\_  
Secretary

## Financial Condition and Activities

With respect to the actual, ongoing financial condition and activities, the executive director shall not cause or allow the development of fiscal jeopardy or a material deviation of actual expenditures from board priorities established in ends policies.

Accordingly, the executive director shall not:

1. Expend more funds than are projected to be received in the fiscal year.
2. Fail to settle payroll and debts in a timely manner.
3. Allow tax payments or other government-ordered payments or filings to be overdue or inaccurately filed.
4. Make a single purchase or commitment of greater than \$40,000 without prior board approval.
5. Acquire, encumber, or dispose of real property without prior board approval.
6. Fail to aggressively pursue receivables after a reasonable grace period.
7. Add bank signatories without an approved board resolution.
8. Allow bank accounts to be unreconciled for more than thirty (30) days.
9. Fail to produce financial statements at each meeting of the board without an appropriate explanation as to the reason for the delay.
10. Allow loans or guarantees of obligations to a director, officer or employee of the corporation.
11. Allow loans or guarantees of obligations to the organization from a director, officer or employee of the corporation.

Adopted:

Revised: April 23, 2001

Revised: July 14, 2010

## POLICY FOR EXAMINATION OR COPYING OF RECORDS

### GENERAL POLICY:

It is the policy of the Iowa Association of School Boards ("IASB") to meet all reasonable requests for information and documents within the constraints of Iowa Code Chapter 22. The purpose of this policy is to fix fees for public examination and photocopying.

IASB's public records may be viewed during regular business hours. These hours are 8:00 a.m. to 4:30 p.m. Monday through Friday, except for days the office is closed.

### PROVISIONS:

1. This policy is not intended to preclude verbal responses to routine requests for information.
2. If the number of photocopies does not exceed twenty-five (25) single-sided pages, or if Association staff time for responding to the request does not exceed thirty (30) minutes, the following fee schedule shall apply:

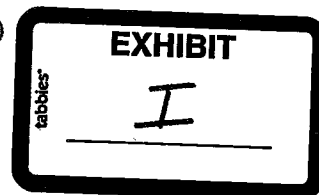
- a. Fees for photocopies: \$0.25 for each black and white copy and \$1.00 for each color copy. Each side is considered one page.

3. If the number of pages to be copied exceeds twenty-five (25) single-sided pages, or if the staff time involved in providing the records exceeds thirty (30) minutes, the following additional fee schedule shall apply:

- |  |  |
|--|--|
| a. Hourly rate for clerical time needed for the reproduction of photocopies    | \$24.00 (prorated to the nearest fifteen (15) minutes)                               |
| b. Hourly rate for professional time needed to produce or review the documents | Effective hourly rate of staff member (prorated to the nearest fifteen (15) minutes) |
| c. Routinely prepared or bound reports   | Actual cost to produce.  |

4. The person requesting the information shall be provided a bill, which shall be paid before the photocopies will be released. If the cost of responding to a request is estimated to exceed \$10.00, the person requesting the records will be provided with an estimate of costs, which the person will need to pay prior to the copies being made.

5. IASB will attempt to fill record requests in a timely manner, not to exceed 10 business days, unless an issue arises concerning the disclosure of confidential records that could jeopardize the safety of persons or property and/or records exempt from state or federal law. These types of records include, but are not limited to: security procedures, security codes and passwords, medical records, personnel or employee-related files, documents concerning litigation or claims, and/or



names and addresses of complainants. Requests shall be made to the IASB communications director.

6. All open records requests that are responded to by electronic media shall be done in a format that prevents the document from being altered.

Adopted: April 25, 2010  
Revised: July 14, 2010

**IOWA ASSOCIATION OF SCHOOL BOARDS  
REQUEST FORM TO EXAMINE OR COPY RECORDS**

Description of Record(s) Requested:

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Requester Identification\*

Name of Requester	Address	Telephone No.
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Signature of Requester\*

The person requesting the information shall be provided a bill, which shall be paid before the photocopies will be released. If the cost of responding to a request is estimated to exceed \$10.00, the person requesting the records will be provided with an estimate of costs, which the person will need to pay prior to the copies being made.

\*This information is not required but will be used to provide a response and/or in the event clarification of the record request is needed.

FOR IASB USE ONLY:

Request received by: _____	On: _____
Action assigned to: _____	
Response due date: _____	
Fee amount due: \$ _____	Date fee received: _____
Final response date: _____	

**IOWA ASSOCIATION OF SCHOOL BOARDS  
RESPONSE TO REQUEST TO EXAMINE OR COPY RECORDS**

Date of Response: \_\_\_\_\_

\_\_\_\_\_ Your request has been received and is being processed. IASB will respond within ten (10) business days.

\_\_\_\_\_ The estimated cost of your request is \$\_\_\_\_\_ and must be paid before the documents are released. If more than \$10, you will need to pay before the documents are copied and prepared.

\_\_\_\_\_ The record you have requested is exempt from disclosure under Iowa law. Please see the response below.

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\_\_\_\_\_ IASB does not have any documents responsive to your request.

\_\_\_\_\_ IASB needs additional information to respond to your request. Please provide the following:

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# Skills Iowa Questions and Answers

## What is Skills Iowa?

Skills Iowa provides two technology tools to Iowa schools and the training and support to implement them through a federal grant:

**Skills Tutor** provides 5 – 10 minute tutorials in reading comprehension, vocabulary, mathematics, language, library skills and some science to students in grades 3 -12.

**Assessment Center** is a tool that can be used to assess student learning in grades 3-12 in reading comprehension, mathematics and the conventions of language. Teachers, parents, and students get a better understanding of what students know and don't know. Teachers are supported in determining where to go next with their instruction.

Both of these programs have excellent reporting features that can organize data and provide specific information to students, teachers, and parents much more quickly than has been possible in the past. As in the business world, the computer can be used to do things we have traditionally done in schools by hand more quickly and efficiently.

IASB provides not only the tools but also the training and support for implementation of the tools. The research is clear that unless educators receive significant training and support, most educational innovations will go by the wayside. So to help ensure implementation with students and resulting student learning, we provide the necessary support for implementation. Both of these tools are web-based, so students, teachers, principals, and parents can access them wherever they have access to the Internet – at home, at school, at the public library or community centers. These tools and the training and support to implement them are provided at no cost to the local district and paid for by the grant.

## How many schools and student participate in Skills Iowa this year and what is the history of the program?

Currently Skills Iowa serves approximately 80,000 Iowa kids in 125 school districts in 309 buildings in Iowa.

Skills Iowa originally came to Iowa through a multi-state grant:

Below are the number of school buildings participating in Skills Iowa since IASB was involved starting in the 2004-05 school year:

04-05 - 93 school buildings (acted as a subcontractor)

05-06 - 222 school buildings (acted as a subcontractor)

06-07 - 210 school buildings (received a \$298,111 state grant – spent all but approx. \$8,000)

07-08 - 225 school buildings (received a \$2,651,888 state grant – although not all was spent)

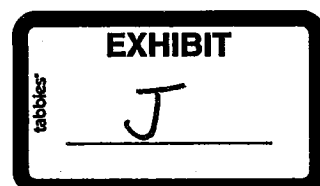
08-09 - 225 school buildings (received a \$2,394,015 federal grant – although not all was spent.

Also received a \$500,000 state grant)

09-10 - 300 school buildings (received a \$3,330,000 federal grant)

10-11 – 309 school buildings (receiving a \$3,549,329 federal grant)

Not all schools have been in the program for the entire time. Sometimes schools decide the Skills Iowa tools don't work for them, so they drop out. There is no mandate for participation. Schools decide if it works for them.





## **Who works on Skills Iowa and what do they do?**

Susie Olesen, a full time IASB employee, is the project director. Prior to the 2009-10 school year, she directed this grant part time and also provided board development services. Shortly after the 2009-10 school year began, she was assigned to Skills Iowa full time. She was a teacher for 29 years and part-time curriculum director for approximately 6 years of those 29 years. She spent the majority of her educational career at Greenfield, which is now Nodaway Valley, but taught also in Lisbon and Mt. Vernon in the early 1970s. She has her BA and MA degrees from the University of Iowa in education. In addition, she received 24 graduate hours from Drake University in school administration. She recruits schools for participation, supervises the training staff, communicates with the schools, the vendor, and Senator Harkin's office, provides professional development to the Skills Iowa training staff, writes a school improvement newsletter called *Raising the Bar*, provides training and support to three school buildings, and other duties related to the grant.

Seventeen people with Iowa teaching licenses who are either former or retired teachers provide the training and support to schools and are paid through contractual agreements. New schools receive 6-8 hours of initial training and then extensive follow up and support throughout the year, depending on their local needs and availability. Returning schools receive a beginning of the year training time of 3-4 hours and also follow-up and support based on their local needs and availability. This training and support is critical to the implementation of the Skills Iowa technology tools.

## **What does the research say about programs like Skills Iowa?**

Skills Iowa personnel encourage schools to use both Assessment Center and Skills Tutor as formative assessment data. Formative assessment is an educational practice where teachers use information from students to determine what to teach next based on what kids have demonstrated they know and can do (or don't know and can't do). Paul Black and Dylan William studied all the research related to formative assessment and wrote an article in a well respected educational journal called *Phi Delta Kappan* in 1998. They said, "All these studies show that innovations that include strengthening the practice of formative assessment produce significant and often substantial learning gains."

Skills Iowa is certainly not the only kind of formative assessment data teachers use. Teachers have a myriad of data at their fingertips and effective teachers use it all. They observe and listen to students regularly and learn more about what those students know and can do. Effective teachers examine the daily work of their students. They create short assessments on the spot to determine what students know and act on that immediately. They look at projects students have created. They study end-of-unit assessment results whether those results are traditional tests or student created projects. Effective teachers use whatever kids produce to inform their instruction. Skills Iowa provides information teachers can add to their rich data environment. The advantage Skills Iowa provides is that the Assessment Center program is aligned to the Iowa Core Curriculum and the data gathered from these assessments is well organized and provides excellent information regarding what skills and concepts students have learned and what they have not in an organized, easy-to-read fashion.

Besides providing data for teachers to analyze, Skills Tutor provides practice in the basic skills. Just as children need practice to learn to play the piano or basketball or complete their daily chores well, they also need practice in the math facts, reading, the conventions of grammar, and other topics provided in the Skills Tutor program.

## **Can technology replace teachers?**

Absolutely not. In those classrooms where Skills Iowa is used well, principals and faculties determine how to use the tools in ways that best supports the learning of students. Skills Iowa, nor any technology program, will ever take the place of a fine teacher, but Skills Iowa can provide

important tools, data, and information as teachers provide practice, remediation, and acceleration for their students.

### **What do teachers say about the Skills Iowa?**

In a survey sent to all Skills Iowa teachers and principals last spring, over 90% of those who responded said they would recommend Skills Iowa to people who have their same job. In that same survey, we learned that the more training and support teachers have in using the Skills Iowa tools, the more they find it useful and effective.

### **When are students expected to use the Skills Iowa tools?**

Each school determines how the Skills Iowa tools will work best for them. Some students use the tools during computer lab time or in the library. In some classrooms there are learning centers where students can use the Skills Iowa tools. Some teachers use the tutorials to teach a concept to the whole class on an overhead projector as a way to introduce a concept or skill. Some students are assigned Skills Iowa work as homework and either do it in the lab or classroom before or after school, at the community center, at the public library, at home, or at a friend's home.

### **How do schools become involved in the program?**

IASB has sent out numerous emails to school superintendents inviting them to learn more about the program. If a school responds with interest, Susie Olesen, the project director, or another person working for Skills Iowa, goes to the school and demonstrates the use of the tools, usually to a leadership team from the interested school. At that meeting, participation requirements are provided.

If you have anymore questions about Skills Iowa, send Susie an email at [Susie@skillsiowa.org](mailto:Susie@skillsiowa.org). Additional information can be found at the Skills Iowa website: [www.skillsiowa.org](http://www.skillsiowa.org)