

Principal Interviews 2015/16

Discussion (a)
Elementary Principal

Finalists

Steve Humphrey Middle School Principal, Exira-Elk Horn Kimballton CSD
Bill Huntington Career Technical Liaison, Southwest Community College
Rhonda Sheldon JH/HS Lead Teacher - JH/HS Life Science Teacher, Sidney CSD

Interview Date - Sunday, February 22 at 3 p.m.

Board/Administration

Heidi Lowthorp - facilitator
Alisha Ettleman
Erika Graham
Brad Johnson
Larry Holt
Gregg Cruickshank
Janet Lemrick - Board Secretary
Jen Maher - Board Treasurer

Staff

Donnie Sears - facilitator
Luke Buttry
Barb Pierce
Jessica Athen
Janice Shanno
Brenda Benedict
Lana Thompson

Parents/Community

Carolyn Maher - facilitator
Kala Clark
Jay Daffer
Mike Daly
Kim Laumann
James Nennemann
Kim Reed
Tracy Schroeder
Brian Shirley

Students

Jacob Smith - facilitator
Gavin Driskell
Jake Gilson
Jolean McClane
Vivianna Alvarez
Presley Brumbaugh
Caitlyn Rasco
Dane Moyer

Role of facilitator

- Greet the candidate at the entrance to the interview room.
- Once the candidate is comfortable, give a general introduction of the candidate and ask each team member to **briefly** introduce themselves and share their position (parent, teacher, etc..).
- Monitor the flow of the interview and monitor time so as many questions as possible are addressed by the candidate.
- Once the first interview is done note the number of question asked and strive to address the same questions with each candidate.

Schedule for JH/HS Principal Interviews
Sunday, February 22
JH/HS Building - 2754 Knox Road

All finalists will meet with Gregg Cruickshank at 2:30 p.m. in the board room.

All members of the interview groups please report to your rooms no later than 2:45 p.m.

Room 126 (Dyan Larsen's) - Hospitality Room

Room 125 (Janice Shanno's) - Staff

Room 124 (Theresa Focht's) - Students

Room 123 (Connie Scott's) - Parents/Community

Room 122 (Tina Ocken's) - Board/Administration

<u>Time</u>	<u>Staff</u>	<u>Students</u>	<u>Parents/Comm.</u>	<u>Board/Adm.</u>
3:00 - 3:45	Sheldon	Huntington	Humphrey	Open
4:00- 4:45	Open	Sheldon	Huntington	Humphrey
5:00- 5:45	Humphrey	Open	Sheldon	Huntington
6:00- 6:45	Huntington	Humphrey	Open	Sheldon
6:45 - 7:15	Time for each interview group to debrief, review feedback forms, and organize thoughts/information they would like their facilitator to share with the Board in closed session.			

**JH/HS Principal Finalist
Feedback Form**

Name of Finalist _____

Feedback from **Staff** **Parent/Comm.** **Student** **Board/Adm**

To be completed by each team member and turned into group facilitator after each finalist interview.

What did the finalist say that impressed you?

What did the finalist say that concerned you?

Other comments:

Questions - Board/Administration

- Please share with us a little bit about yourself and why you are interested in becoming the next JH/HS Principal at Sidney?

- What steps will you take to build positive and constructive relationships with students, staff, parents, and community?

- How will identify the educational needs and values of our school and community?

- What criteria would you/do you use to evaluate a teacher, and why are these criteria most important? Do you have separate criteria for evaluating new versus experienced teachers?

- Tell us about a decision that you made in a leadership role that had a significant positive impact on your building and/or district.

- Describe a time when your leadership approach did not appear to work. What happened and how did you adjust?

- Tell us about a difficult conflict-resolution situation you had to deal with. Who was involved and what methods/strategies did you use to resolve the conflict?
- What strategies will you put in place to insure a safe and orderly learning environment?
- What role should technology play in the junior high/high school and how can it support teaching and learning?
- As the JH/HS Principal at Sidney, describe your approach in working with neighboring school districts to maximize educational opportunities for all students.
- From your perspective, what are the characteristics of positive and constructive relationship between a principal and a superintendent? Between a principal and a school board?

- What role should technology play in the junior high/high school and how can it support teaching and learning?
- As an educational leader, tell us about a mistake you made and what you did to resolve the situation.
- What strategies will you put in place to insure a safe and orderly learning environment?
- As the JH/HS Principal at Sidney, describe your approach in working with neighboring school districts to maximize educational opportunities for all students.

• Questions for us ?

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Questions - Parents/Community

- Please share with us a little bit about yourself and why you are interested in becoming the next JH/HS Principal at Sidney?

- What steps will you take to build positive and constructive relationships with students, staff, parents, and community?

- What strategies will you utilize to effectively communicate with parents?

- How would you hope one of your students describe you to their parents after the first week as the principal at our school?

- How will you develop a sense of school spirit among students and parents? What strategies would you implement to promote school spirit?

- What qualities must a person possess to an effective teacher/educator?

- As an educational leader, tell us about a mistake you made and what you did to resolve the situation.
- Describe a time you had to make a difficult decision, and you knew that whatever you decided, some people would be unhappy?
- In a leadership role, how will you emphasize/have you emphasized the need to address each child's individual learning and personal needs with your staff?
- What strategies will you put in place to insure a safe and orderly learning environment?
- What role should technology play in the junior high/high school and how can it support teaching and learning?
- As the JH/HS Principal at Sidney, describe your approach in working with neighboring school districts to maximize educational opportunities for all students.

- What role do co-curricular activities (speech, drama, music, clubs, athletics, etc..) play in the educational mission of a school district?

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Questions for us?

Questions - Students

- Please share with us a little bit about yourself and why you are interested in becoming the next JH/HS Principal at Sidney?

- How would you hope one of your students would describe you to their parents after the first week as the principal at our school?

- How will you develop a sense of school spirit among students ~~and parents?~~ What strategies would you implement to promote school spirit?

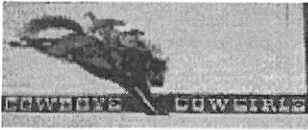
- As an educational leader, tell us about a mistake you made and what you did to resolve the situation.

- What role do co-curricular activities (speech, drama, music, clubs, athletics, etc..) play in the educational mission of a school district?

- To what degree should students be involved in the decision-making process at a school? Are ~~their~~ ^{there} specific areas/situations where students should have significant involvement in the decision-making process?
- How do you/will you balance being an authority figure with being personable and developing relationships with students?
- If a student brought a request to you, how would you handle it? If it was a good idea how would you move the process forward to make it a reality?
- As a principal, how would you like other schools and other communities in our conference to view us?

• Questions for us?

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Gregg Cruickshank <gcruickshank@sidney.k12.ia.us>

Interview Questions

rkabcreed@windstream.net <rkabcreed@windstream.net>
To: gcruickshank@sidney.k12.ia.us

Mon, Feb 16, 2015 at 10:32 AM

1. What are the driving qualities you feel necessary a person posses to be an effective teacher/educator?
2. As a secondary principal what would you see your role being in the school and community?
3. If you were to become the secondary principal for Sidney Schools, what do you envision your role being in the process of working with neighboring school districts to maximize educational opportunities for all students?
4. A child (star-student-athlete) of a prominent and influential family in the community has been reported to you by multiple teachers as cheating on assignments and tests. How do you address the situation?
5. Share your feelings on school spirit. What is your approach to enhance unity and spirit within the school and community?
6. In your perspective what role do athletics and other extra-curricular programs play in the educational process at the secondary level?

Potential Interview Questions

How would you hope that one of the students would describe you to his/her parents after the first week as the principal at our school?

Describe your style of supervising staff.

How might you use staff evaluation as a tool in order to help teachers and support staff develop new competencies?

How will you identify the educational needs and values of our school and community?

As a new principal, how would you go about building relationships of trust and collaboration with staff, parents and student?

What do you feel are the key components of maintaining high staff morale and the ability to work as a team?

How will you develop a sense of school spirit among students and parents? What strategies would you use to improve?

What role should technology play in a middle school/high school and how can it support teaching and learning?

The term "at risk" is used frequently by educators to describe a targeted group of the total school population. Please discuss your interpretation of this group of students and how will you address their varied needs?

Tell us about a decision in that you made a leadership role that has had the most impact.

In your role as an educational leader, tell us about a mistake that you have made in the past and how did you resolve the situation.

Think about the most upset person you've had to deal with lately (in the school setting). Describe how you handled it.

What has been the hardest change for you to adapt to over the years?

Principal Interviews

February 25, 2015

Candidates Name _____

Please share a little bit about yourself and why you want to be the next JH/HS Principal at Sidney Community Schools?

What drives you to become a principal? How will you define success as the JH/HS Principal at Sidney Community Schools?

Identify and describe 3 key factors in being an effective principal.

What are your 3 most important goals for the Sidney Community Schools with you serving in the capacity of JH/HS Principal?

How do you/would you maintain staff morale in a time of turmoil?

What do you see yourself doing professionally in 5 years? 10 years? What are your long range professional goals?

The Board identified an important quality of the next Principal as someone who will cooperate and collaborate in a progressive, improvement - oriented environment. Define collaboration.

What are the key components to effective communication with the various groups that make up a public school community?

What are the key principles to follow regarding effective resolution of conflict?

As an educator familiar with the Sidney district, describe how your familiarity will be an asset in your new role as the Junior/Senior HS Principal? (Rhonda)

As an educator new to the Sidney district, describe how you will facilitate as seamless a transition as possible with students, staff, parents, and community in your new role as JH/HS Principal?(Bill)

How do you plan to acclimate to the new post and hit the ground running with staff, teachers, parents, and community?

What qualities will you bring to the district as an administrator to enhance the effectiveness of the Administrative Team? Board and Administrative Team?

Define bullying? What steps would you take to determine if a situation was an actual case of bullying based on your definition? If the situation was determined to be an actual case of bullying what steps would you take to stop the bullying?

What core principles will drive you in the decision-making process as a JH/HS Principal?

Describe a specific example of a situation that requires decisiveness in making a decision? Describe a specific example of a situation that requires a deliberative approach in making a decision

Are you a self-starter? Elaborate. How do you work best - by yourself or as part of a group?

Describe your most significant achievement as an educator?

What questions do you have for the Board, Board Officers, and/or Administration?

Yearly Summer Project Priorities (less 25,000)	Major Project Considerations
Remodel restrooms at the elementary	Auto/Ag/CTE Center at the JH/HS
AC or AC/Heat for the fitness facility	FB/Track/Bleachers/Lights/Concessions/Restroom renovation or new facility at JH/HS
Update electrical at the elementary-- extension cords are powering the Apple TV projectors	Renovation of Elementary Gym and redesign into gym/auditorium
Sand down gym floor at the elem. gym	Roof replacements
New scoreboards BB/SB	Construct a Fine Arts Auditorium @ HS
Paint new lockers at JH/HS Red	Take the elementary gym and redesign it to be both a gym and an auditorium
Mud jack cement areas where sidewalk/drives are uneven at elementary	New AC and Heat for the Elementary Gym
Paint exterior doors at elementary	Pave the East end of the JH/HS Parking Lot
Remodel locker rooms and restrooms at elementary gym (Restrooms alone less than 25,000)	Grass infield BB/ sprinkler system for BB and SB
JH HS Replace the windows that have soft sills/panes	
Install mini blinds on windows of elementary	
Repair chain link fence at the elementary	
Sidney Sign out in the grass area in front of the Jr. Sr. High School	
Periodic maintenance to JH/HS parking lot	
Paint Parking Lots every 3 years	
Roof/Windbreak over walk way - portable	
Replacement of heat pump units at the JH/HS	
New water fountains in both attendance centers	



Gregg Cruickshank <gcruickshank@sidney.k12.ia.us>

VPPEL/GO Bond/Revenue Bond Election

Margaret Buckton <margaret.m.buckton@gmail.com>
 To: Gregg Cruickshank <gcruickshank@sidney.k12.ia.us>
 Cc: Larry Sigel <larry.sigel@gmail.com>

Sun, Nov 6, 2016 at 3:13 PM

Hi Gregg,

For either, the election timelines, including notice to the county commissioner of elections, which is different for a special election or regular school election, are found on this page:

<http://www.iowaschoolfinance.com/elections>

the PPEL is much easier - just board resolution calling the election, then notice to the county commissioner that the board is calling the election. Use the elections page above to figure out when you want to have it voted on, then back up before that enough time to have a board meeting with a board resolution to call the election and the appropriate notice. Here's the web page with sample resolution language, PPT explaining the PPEL levy, income surtax if you want to use that, etc.

<http://www.iowaschoolfinance.com/PPEL> 50%+1 approval

The debt levy is tougher, requiring facilities needs assessment, involvement of architects, planning for the size of the project, nailing down details, then the same 45 days notice for the election. One specification is that you must wait 180 days after the previous election if it is defeated. Here's a link to the DE's Steps in a School Bond Election, a guideline for Iowa schools to follow in school board elections. It refers to the Code of Iowa in cases where the law required certain specified procedures. If this is the route you want to go, the attorney helping with the bond language and all of the specifications will give you the timeline, but the initial steps are in this guide.

Let us know else you need,
 Margaret

60% approval

Margaret Buckton, Lobbyist, UEN and RSAI
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 margaret.buckton@isfis.net
 [Quoted text hidden]

School Elections

Election Dates & Timelines

Election Dates: Schools are limited to one of four special election dates. The election dates are:

Odd Numbered Years

1. 1st Tuesday in February
2. 1st Tuesday in April
3. Last Tuesday in June
4. 2nd Tuesday in September (Board Election Date)

Even Numbered Years

1. 1st Tuesday in February
2. 1st Tuesday in April
3. 2nd Tuesday in September
4. 1st Tuesday in December

Here are the dates for the next several years:

Election Dates	District Notice Deadline to the County Commissioner of Elections
12/06/2016	46 days notice - 10/21/2016 by 5:00 p.m.
02/07/2017	46 days notice - 12/23/2016 by 5:00 p.m.
04/04/2017	46 days notice - 02/17/2017 by 5:00 p.m.
06/27/2017	46 days notice - 05/12/2017 by 5:00 p.m.
09/12/2017	Board Election Nomination papers due 07/31/2017 by 5 p.m.
02/06/2018	46 days notice - 12/22/2017 by 5 p.m.
04/03/2018	46 days notice - 02/16/2018 by 5 p.m.
09/11/2018	46 days notice - 07/27/2018 by 5 p.m.
12/04/2018	46 days notice - 10/19/2018 by 5 p.m.
02/05/2019	46 days notice - 12/30/2018 by 5 p.m.

Secretary of State Guidance for Board Secretaries (<http://sos.iowa.gov/elections/schools.html>)

School Board Election Information

The Secretary of State's Guidance on School Elections includes the following:

- Redistricting & Reprecincting (<http://sos.iowa.gov/elections/redistrictreprecinct/index.html>)
- School Secretary's Guide (<http://sos.iowa.gov/elections/pdf/electioninfo/schoolsecguide.pdf>) - Guide for board nominations and board elections
- Election Planning Worksheet (<http://sos.iowa.gov/elections/pdf/forms/schoolsecwksht.pdf>)
- Filing Officer's Guide (<http://sos.iowa.gov/elections/pdf/auditors/eah/filingofficer.pdf>)
 - Nomination Papers Log (<http://sos.iowa.gov/elections/pdf/forms/nompaperlog.pdf>)
 - Receipt for Nomination Papers (<http://sos.iowa.gov/elections/pdf/auditors/nompapersreceipt.pdf>)
- Vacancy Information (<http://sos.iowa.gov/elections/pdf/auditors/eah/vacancies.pdf>)

Election Calendars

- School Election Calendar (<http://sos.iowa.gov/elections/pdf/auditors/schoolcal.pdf>) - Dates and timetables for board member elections
- Possible Special Election Dates (<http://sos.iowa.gov/elections/electioninfo/specelectioncal.html>)
- Three-Year Election Calendar (<http://sos.iowa.gov/elections/electioninfo/3yrelectioncal.html>)

Election Timelines

The following Iowa Code sections provide timelines of publications, hearings and notices for school levies:

- 39.2 (<https://www.legis.iowa.gov/DOCS/ACO/IC/LINC/Section.39.2.pdf>) tells you when you can have the election. There are two possible timeline scenarios, either at a regular school election or a special election, with restrictions on those dates to four times a year.
- 47.6 (<https://www.legis.iowa.gov/DOCS/ACO/IC/LINC/Section.47.6.pdf>) regarding special elections: If the election is a special election date that is not a regular school election (any time other than the 2nd Tuesday in an odd numbered year), that requires 46 days of notice to the county commissioner of elections for a special election not held in conjunction with a regular school election.
- 47.6 regarding regular school elections: If the levy ballot initiative coincides with the regular school board election (the 2nd Tuesday in an odd numbered year), that triggers the language in 47.6 that requires 32 days of notice to the county commissioner of elections and says "for regular school board elections, notice is due when nomination papers are due, but in both cases, in no less than 32 days before election."
- 257.18 (<https://www.legis.iowa.gov/DOCS/ACO/IC/LINC/Section.257.18.pdf>) defines the Instructional Support public meeting notice publication requirement timeline of 10-20 days and the requirement to pass the resolution of election after the public meeting.
- 298.2 (<https://www.legis.iowa.gov/DOCS/ACO/IC/LINC/Section.298.2.pdf>) defines processes for voter approved PPEL: no specific requirement of public hearing. Board resolution would direct county commissioner of elections to hold the election on one of the dates specified in 39.2.
- 423F.3(2) (<https://www.legis.iowa.gov/DOCS/ACO/IC/LINC/Section.423f.3.pdf>) defines timelines for a State Penny Revenue Purpose Statement voter approval, which refers to the dates and timelines in 39.2 regarding special elections.

SOS Timeline for Special Election (<http://www.isfis.net/files/Finance/Elections%20Timeline%20from%20SOS.pdf>)

School Board/District Role in Ballot Initiative

Whether it's the revenue purpose statement, PPEL, ISL, or bond issue on the ballot, Iowa law governs the involvement of local officials and employees regarding advocacy for the ballot initiative. This Board and District Role in Ballot Initiative

(<http://www.isfis.net/files/Policy/Board%20and%20District%20Role%20in%20Ballot%20Initiative.ppt.pptx>) defines the roles and responsibilities of local leaders, as well as helpful links to get expert advice about compliance with the ethics requirements. See the Ethics and Campaign Disclosure Board *Permitted and Prohibited Guide* here (http://www.iowa.gov/ethics/forms_brochures/brochures/public_funds/publicfunds.pdf).

This link is to the Iowa Ethics and Campaign Disclosure Board page that tells you everything you need to know about forming a PAC for a local ballot initiative.

http://www.iowa.gov/ethics/campaigns/committee_info/county/ballot_issue_index.htm (http://www.iowa.gov/ethics/campaigns/committee_info/county/ballot_issue_index.htm)

[Click here for more information on the Physical Plant and Equipment Levy \(/node/81\)](#)

[Click here for more information on the Instructional Support Levy \(/node/79\)](#)

[Click here for more information of the Debt Service Levy \(Bond Issue\) \(/node/93\)](#)

[Click here for more information on the State Penny for School Infrastructure \(/node/83\)](#)

[Contact \(/contact\)](#)



special education services. This child's story captures just one aspect of the customized support each child receives.

A big thank you to IASB members Vinton-Shellsburg, Humboldt and Tri-Center for working with IASB to share these great stories.

Thank you, Iowa AEs for your support of the Promise of Iowa! Each of Iowa's nine area education agencies has committed to assist with the campaign stories and content. The support of AEA communications staff is a game-changer to make this campaign work.

More to come: Watch for additional videos, photos and shareable facts to come.

Iowa public schools bring great value to students, communities and our economy. Investments in public education make a difference.

Get connected and spread the word.

Best wishes,



Lisa Bartusek
Executive Director

Visualizing Data: FY 2017 – Districts with a Voter Approved Physical Plant and Equipment Levy (VPPEL)

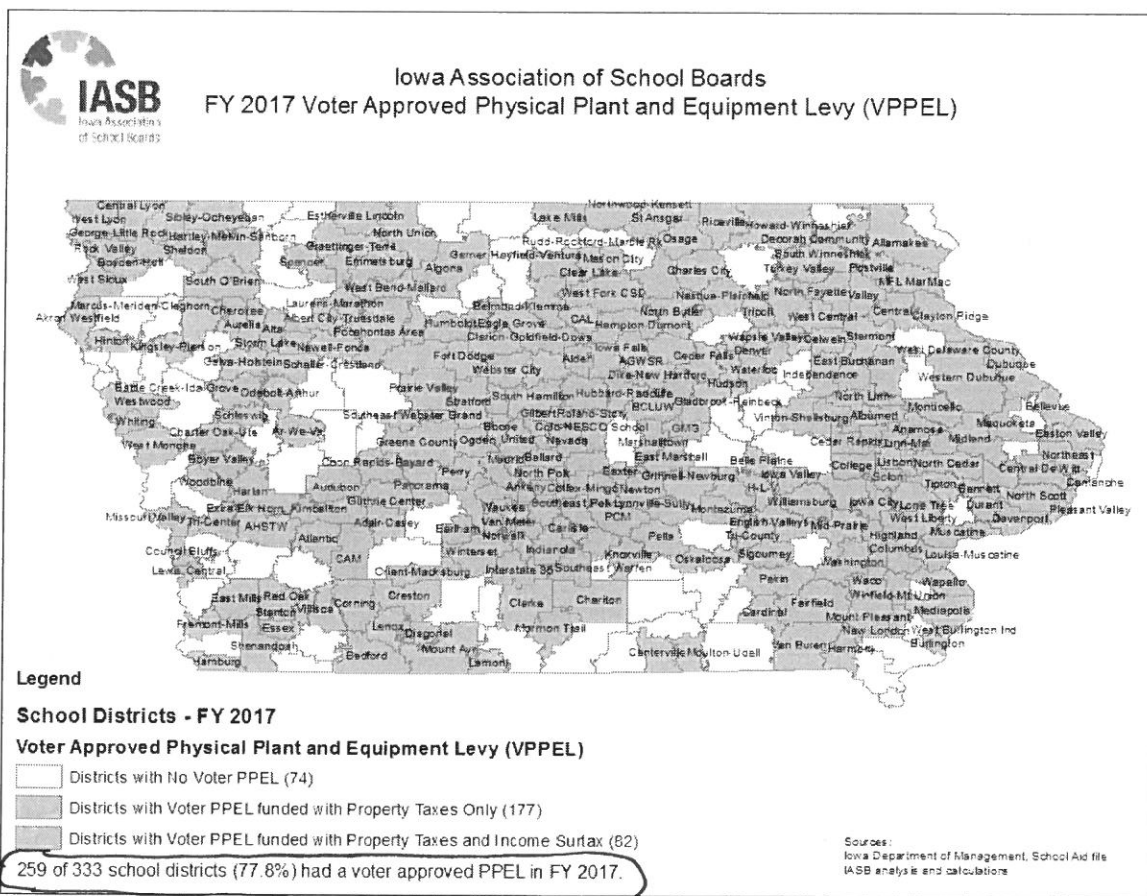
Upon voter approval, school districts may levy for a physical plant and equipment levy at a rate of \$1.34/\$1,000 of taxable valuation. Additionally, if the voters approve, a combination of property tax and income surtax may be used to fund the voter approved PPEL. If an income surtax is used, the combined amount generated from the income surtax and property tax cannot exceed what would be generated from the \$1.34 property tax rate.

The following table provides statistics for districts with a voter approved PPEL in FY 2017. Analysis is broken out for districts that have only a property tax to fund voter PPEL (177 districts) and districts that have a combination of property tax and income surtax (82 districts). "Income Surtax Property Tax Rate Equivalent" provides the property tax rate reduction resulting from the usage of an income surtax.

Statistics for School Districts with VPPEL in FY 2017

	177 Districts with VPPEL Property Tax Only		82 Districts with VPPEL Property Tax and Income Surtax Combination		
	Property Tax Rate		Property Tax Rate	Income Surtax Rate	Income Surtax Property Tax Rate Equivalent
Average	\$ 0.9734		\$ 0.6420	3.2%	\$ 0.4232
Median	\$ 1.0000		\$ 0.6152	3.0%	\$ 0.3825
Maximum	\$ 1.3400		\$ 1.2714	10.0%	\$ 1.2876
Minimum	\$ 0.1938		\$ 0.0524	1.0%	\$ 0.0571
Range	\$ 1.1462		\$ 1.2190	9.0%	\$ 1.2305

The following map provides a breakdown of districts with a voter approved PPEL in FY 2017. Nearly 78 percent of districts had a voter PPEL in FY 2017.



Contact Patti Schroeder at pschroeder@ia-sb.org or (515) 247-7031 or Shawn Snyder at ssnyder@ia-sb.org or (515) 247-7054 with questions or comments regarding this information.

Update: Department of Labor Appeals Injunction to FLSA Overtime Rule

On December 1, 2016, the Department of Labor (DOL) appealed the injunction that halted the Fair Labor Standards Act (FLSA) overtime rule.

298.2 Imposition of physical plant and equipment levy.

1. a. A physical plant and equipment levy of not exceeding one dollar and sixty-seven cents per thousand dollars of assessed valuation in the district is established except as otherwise provided in this subsection. The physical plant and equipment levy consists of the regular physical plant and equipment levy of not exceeding thirty-three cents per thousand dollars of assessed valuation in the district and a voter-approved physical plant and equipment levy of not exceeding one dollar and thirty-four cents per thousand dollars of assessed valuation in the district. However, the voter-approved physical plant and equipment levy may consist of a combination of a physical plant and equipment property tax levy and a physical plant and equipment income surtax as provided in subsection 4 with the maximum amount levied and imposed limited to an amount that could be raised by a one dollar and thirty-four cent property tax levy.

b. For school budget years beginning on or after July 1, 2015, a school district may by resolution of the board of directors adopted prior to April 15 preceding the budget year impose a physical plant and equipment levy at a rate in excess of the levy rate limitations under paragraph "a" if the board has refunded or refinanced a loan agreement entered into under section 297.36 and such refunding or refinancing complies with the maturity period authorized under section 297.36, subsection 1, paragraph "c", and results in a lower amount of interest on the amount of the loan agreement. However, the rate imposed by a school district under this paragraph shall not exceed the rate imposed during the budget year in which the loan agreement was refunded or refinanced. Authorization to exceed the levy rate limitations of paragraph "a" shall terminate upon the maturity of the loan agreement after refunding or refinancing. Upon adoption of the resolution under this paragraph "b", the board shall comply with the requirements of section 297.36, subsection 1, paragraph "b".

2. If the electors of a school district have authorized a voter-approved physical plant and equipment levy not exceeding sixty-seven cents per thousand dollars of assessed valuation in the district prior to July 1, 1997, the levy shall continue for the period authorized under the voter-approved levy, and the maximum levy that can be authorized by the electors under the voter-approved levy on or after July 1, 1997, under this section, is an additional sixty-seven cents for a period to coincide with the period for which the initial physical plant and equipment levy in the district was approved.

3. The board of directors of a school district may certify for levy by April 15 of a school year a tax on all taxable property in the school district for the regular physical plant and equipment levy.

4. a. The board may on its own motion, and upon the written request of not less than one hundred eligible electors or thirty percent of the number of eligible electors voting at the last regular school election, whichever is greater, shall, direct the county commissioner of elections to provide for submitting the proposition of levying the voter-approved physical plant and equipment levy for a period of time authorized by the voters at the election, not to exceed ten years. The election shall be held on a date specified in section 39.2, subsection 4, paragraph "c". The proposition is adopted if a majority of those voting on the proposition at the election approves it. The voter-approved physical plant and equipment levy shall be funded either by a physical plant and equipment property tax or by a combination of a physical plant and equipment property tax and a physical plant and equipment income surtax, as determined by the board. However, if the board intends to enter into a rental or lease arrangement under section 279.26, or intends to enter into a loan agreement under section 297.36, only a property tax shall be levied for those purposes. Subject to the limitations of section 298.14, if the board uses a combination of a physical plant and equipment property tax and a physical plant and equipment surtax, for each fiscal year the board shall determine the percent of income surtax to be imposed expressed as full percentage points, not to exceed twenty percent.

b. If a combination of a property tax and income surtax is used, by April 15 of the previous school year, the board shall certify the percent of the income surtax to be imposed and the amount to be raised to the department of management and the department of management shall establish the rate of the property tax and income surtax for the school year. The physical plant and equipment property tax and income surtax shall be levied or imposed, collected,

and paid to the school district in the manner provided for the instructional support program in sections 257.21 through 257.26.

5. *a.* The proposition to levy the voter-approved physical plant and equipment levy is not affected by a change in the boundaries of the school district, except as otherwise provided in this section. If each school district involved in a school reorganization under chapter 275 has adopted the voter-approved physical plant and equipment levy, and if the voters have not voted upon the proposition to levy the voter-approved physical plant and equipment levy in the reorganized district, the existing voter-approved physical plant and equipment levy is in effect for the reorganized district for the least amount and the shortest time for which it is in effect in any of the districts.

b. An authorized levy for the period of time approved is not affected as a result of a failure of a proposition proposed to expand the purposes for which the funds may be expended.

89 Acts, ch 135, §107; 92 Acts, ch 1187, §7; 93 Acts, ch 1, §9, 10; 97 Acts, ch 182, §1, 2; 2009 Acts, ch 57, §80; 2010 Acts, ch 1033, §42; 2013 Acts, ch 88, §28, 29; 2015 Acts, ch 122, §1, 2
Referred to in §257.19, §257.31, §274.37, §275.12, §279.26, §283A.9, §292.1, §297.36, §298.14, §298A.4, §403.19, §423F.3
Subsection 1 amended

Steps in a School Bond Election

Guideline

This publication is intended to serve as a guide for Iowa schools to follow in school bond elections.

It refers to the Code of Iowa in cases where the law required certain specified procedures. Laws do change and opinions of the attorney general's office may change the interpretations of laws. Therefore, thoroughly investigate all laws and opinions relating to school bond elections.

For additional information contact Gary Schwartz, Consultant, School Facilities.

Email address: Gary.Schwartz@iowa.gov

Steps in a School Bond Election

Step One: Determining Needs

Why is there a need?

- A. Buildings are unsafe.
- B. Buildings are outdated.
- C. Buildings cannot be modernized because of design or cost.
- D. Special facilities are needed.
- E. A better educational program is needed.
- F. Over-crowdedness.
- G. Buildings are destroyed.
- H. Technology.
- I. Other.

Who determines the need?

- A. The school board.
- B. The administrative staff.
- C. The teaching staff.
- D. The nonprofessional staff.
- E. The PTA or PTO.
- F. Concerned citizens' groups.
- G. The student body.
- H. Any individual in the district.
- I. Others.

Steps in a School Bond Election

Step Two: Assessing Needs

The school board assumes its responsibility (legally by a motion in its minutes) to investigate the reported need. The board appoints a chairperson to head a citizens' committee composed of a cross-section of the community. The chairperson appoints subcommittees to investigate areas that are thought to be important.

The chairperson of each subcommittee and the chairperson of the citizens' committee will act as a steering committee for the board. After the investigation, the steering committee compiles its report and makes recommendations to the board.

There are many areas that the committee may wish to investigate, some of them are:

- A. Present and future enrollments.
- B. How well the facilities serve the needs of the present educational program.
- C. Planned changes in the educational program and related changes in facility requirements.
- D. The physical condition of the building(s).
- E. The financial status and the bonding capacity of the district.
 - The bonding capacity of a school district is based on the actual evaluation of the property within the district. Districts may become indebted to a figure equal to five percent of their actual valuation less the present indebtedness. The actual valuation figure for each district is available from the office of the county auditor. (296.1)
 - A school board may certify an amount, not to exceed \$2.70 per \$1,000 of assessed evaluation, to pay the principal and interest owed in any one year. (298.18)
 - If the amount of money required to pay the principal and interest exceeds the above limitation, the board may ask the voters to approve an increase in the levy of up to \$4.05 per \$1,000 of assessed valuation. (298.18)
 - The proposition to exceed the \$2.70 limit and the proposition specifying the needed increase may be voted on at the same time. Sixty percent of those voting must approve both measures before the additional amount can be levied.
 - Also, interest on invested monies made available by the bond issue shall be used to pay principal and interest as it comes due or to fund the construction of the project made possible by bond issue. (12C.9)
- F. New approaches to educational methodology, technology and the kinds of space required for each.
- G. Other special areas - a new site, additional course offerings, expanded extracurricular activities, possibilities of remodeling, etc.

If the committee concludes that new or different spaces are needed, the board accepts the recommendations in its minutes.

Steps in a School Bond Election

Step Three: Educational Specifications

District educators must prepare educational specifications describing the spaces needed to house the adopted educational program. They may wish to secure the services of an educational consulting firm for assistance in this step.

The following web site may be of interest. It contains a list of articles on developing educational specifications.

http://www.edfacilities.org/ir/edfacilities_planningII.cfm

The board must employ an architectural firm to study the specifications, determine the kinds of new spaces needed, and help develop preliminary sketches of a building that will accommodate the specifications. Architectural, landscape architectural, or engineering design services for school construction are not subject to competitive bids for public improvement contracts. (26.4)

See Appendix A for a suggested format for the selection of an architect.
See Appendix B for a suggested format for the selection of a construction manager.

Steps in a School Bond Election

Step Four: The Bond Issue Petition

Before a petition to election can be called, the board must project the dollar figure total cost of the project from the estimated square feet needed. This dollar figure must be included on the petition to call the election.

The board should employ a legal consultant to draw up the petition and to be in charge of all legal proceedings to safeguard procedures concerning the bond issue and the subsequent building program.

Be sure the petition is stated in broad, general terms so it doesn't limit the action of the local board in determining the site or kind of building.

Arrange information meetings for all petition takers or circulators before they begin circulating petitions to gain the necessary signatures. These meetings should emphasize the necessary legal information, facts and figures about the needed building program.

Circulate the petition in all parts of the district. This way, more people have a chance to sign the petition and petition takers can tell all residents of the district about the project. The well-known political block system ensures excellent coverage.

Make sure petitioners sign their given names. For example: Not Red Jones, but Raymond J. Jones; and not Mrs. Elmer John, but Arlene Selma John. The address of the petitioner must also be included.

At least 25 percent of the number of legally qualified voters voting in the last election of school officials must sign the petition. (296.2) or 100 whichever is greater

When enough signatures have been obtained, a legal voter of the district must file the petitions with the president of the board and attest to the validity of the signatures.

Be sure the proposition to be voted on conforms to the petition submitted by the electorate.

If the amount of the bond issue is less than one and one-fourth percent of the assessed value of the school district, the board may call an election without the presentation of a petition. (296.2, 298.21) If petitions are not circulated, however, the board loses a good means of distributing information.

Steps in a School Bond Election

Step Five: Calling the Election

Within 10 days after the president receives the petition, (296.2) the president shall call a meeting of the board to set the time, date and place of the election, which may be a special election or may be held at the regular election. The president shall notify the county commissioner of elections of the time of the election. (296.3)

The county commissioner shall publish notice at least 4 days and not more than 20 days before the election in a newspaper published in the district, or if there is none, in a general circulation newspaper published in the county. (49.53)

All special elections which are authorized or required by law, unless the applicable law otherwise requires, shall be held on Tuesday. A special election shall not be held on the first, second, and third Tuesdays preceding and following the primary and the general elections. A special election shall not be held in conjunction with the primary election. A special election shall not be held in conjunction with a school election unless the special election is for a school district or community college. For a school district or merged area, in the odd-numbered year, the first Tuesday in February, the first Tuesday in April, the last Tuesday in June, or the second Tuesday in September. For a school district or merged area, in the even-numbered year, the first Tuesday in February, the first Tuesday in April, the second Tuesday in September, or the first Tuesday in December. (39.2)

Steps in a School Bond Election

Step Six: Campaigning for Passage

Now the district must inform the voting public about the bond election, stressing the fact that the money is needed to improve educational opportunities for present and future children in the school district.

Information can be shared at coffees, block meetings, room parents' meetings, PTA meetings and other public meetings.

Speakers should be available to present information to community groups including the Lions, Rotarians, Kiwanians, the Golden Agers, the Teamsters, the AFL-CIO, the Chamber of Commerce, the American Legion, the Veterans of Foreign Wars, the Farm Bureau, Toastmasters and others.

Print leaflets, brochures and pamphlets, and insert newspaper ads explaining the need for the bond election and urging voters to support it. Conclude all speeches, signs, ads and brochures with "Be sure to vote!" Encourage a large voter turnout.

Use this time to refine the preliminary drawings to ensure that they comply with the educational specifications. Get affected teaching and administrative staff to

initial their particular space or place on the preliminary drawings when it is acceptable to them. (Common sense and good judgment are important here.)

On Election Day, comply with the letter of the law governing elections. Do not leave anything to chance. Those opposing the bond issue will be looking for flaws and improper procedures.

A telephone committee should call voters during the day to remind them to vote. Start calling early and continue until the polls are legally closed.

A bond election for school buildings and/or sites must be approved by at least 60 percent of those voting. (75.1)

All ballots cast and not counted as a vote for or against the proposition shall not be used in computing the total votes cast on the issue. (75.1)

If the bond issue fails, such proposal or any proposal, which incorporates any portion of the defeated proposal, shall not be submitted again to the voters for six months. (75.1)

Steps in a School Bond Election

Step Seven: Preliminary Plans

When the bond issue passes, the board will need to approve the final preliminary plans used during the campaigning for passage step and instruct the architect to proceed with the final building plans and specifications. These actions should be recorded in the board minutes. The final preliminary plans must be a translation of the educational specifications to a tangible building that will serve the educational needs of students today, as well as in the future.

All newly constructed buildings and structures of which is paid for in whole or in part with moneys appropriated by the state but which are not wholly owned by the state are subject to the plan review and inspection requirements of the State Building Code Commissioner's office. If a city within the school district has adopted a building code, electrical code, mechanical code, and plumbing code and performs inspections pursuant to such codes, such buildings or structures shall be built to comply with such codes. However, if a governmental subdivision or city has not adopted a building code, electrical code, mechanical code, and plumbing code, or does not perform inspections pursuant to such codes, such buildings or structures shall be built to comply with the state building code and shall be subject to a plan review and inspection by the commissioner or an independent building inspector appointed by the commissioner. A fee shall be assessed for the cost of plan review and the cost of inspection. (103A.10A)

The State Building Code Commissioner's Office will check to see that the building is accessible to the physically disadvantaged and that it meets state energy efficiency standards.

The board must submit the final plans to the state fire marshal for approval. (100)
The board if applicable must submit plans in accordance with the Life Cycle Cost Analysis requirements. (470)

The board must also be in compliance with the Minimum Plumbing Facilities for all places of public gathering. (104B)

Steps in a School Bond Election

Step Eight: Selling Bonds

Between the time the board approves the preliminary and final plans, it should prepare to sell the voted bonds by:

- A. Employing a competent bonding attorney to handle the transaction-No commission may be paid in connection with the sale of school bonds. The only allowable expenses are those incurred in advertising. (75.6)
- B. Preparing a brochure for interested bond buyers describing the financial condition of the district.
- C. Publishing a notice of sale for two or more successive weeks in at least one newspaper located in the county. The time and place of the sale, the amount to be offered and other pertinent information must be included. (75.2)

Public bonds issued by school districts may be in one or more denominations as provided in the proceedings of the governing authority. (75.10)

No bonds may be sold at less than par, plus accrued interest. (75.5)

Conform to the rules as provided for in the Code of Iowa. (74A.6)

Bonds shall not run for more than twenty years, and be payable semiannually. (298.22)

Expenses for printing and engraving bonds may be paid from the general fund. (298.22)

Bidders may submit sealed bids any time before the call for open bids. (75.3)

The board may call for open bids only after all sealed bids are filed. The secretary should note the best open bid in the board minutes. Then the sealed bids should be opened and the best sealed bid noted in the minutes. (75.3)

The board may accept the lowest bid, or may reject any or all of the bids and advertise a new sale. (75.4)

When the bonds are issued, the secretary of the board registers them in a book kept for that purpose, and delivers them after they have been properly countersigned. The president of the board must sign the bonds and the secretary must countersign them. (298.22)

Steps in a School Bond Election

Step Nine: Final Plans, Specifications, and Bidding Requirements

The next important step is the approval of the final plans and specifications. This approval should be recorded in the minutes of the board of education.

The board must:

- A.** Adopt proposed plans and specifications and a proposed contract form for any improvement costing more than \$100,000 and set a time and place for hearing. The board must hold a hearing to enter into a contract for the public improvement costing more than \$100,000 (73A.2).
 - Notice of the hearing must appear in at least one general circulation newspaper at least 10 days before the hearing. (73A.2)
 - At the hearing, any person interested may appear and file objections to the proposed plans, specifications or contract for, or cost of such improvement. The school district shall hear objections and evidence for or against, and enter of record its decision. (73A.3)
 - The procedures for dealing with objections and appeals are discussed in the Iowa Code Sections 73A.4 to 73A.15.

- B.** Comply with Iowa Code Chapter 26 Public Construction Bidding.
 - If the estimated total cost of the construction project exceeds the competitive bid threshold of \$100,000, the school district must advertise for sealed bids for the proposed public improvement by publishing a notice to bidders. (26.3)
 - School district shall not divide the public improvement project into separate parts, regardless of intent. (26.5)
 - Provide notice to bidders that shall be published at least once, not less than 4 days and not more than 45 days before the date for filing bids, in a newspaper published at least once weekly and having general circulation in the school district. (26.3)
 - Additionally, the school district may publish a notice in a relevant contractor organization publication and a relevant contractor plan room service with statewide circulation, provided that a notice is posted on a website sponsored by either a governmental entity or a statewide association that represents the school district. (26.3)
 - Notice to bidders shall adequately notify a potential bidder of a proposed bid and shall include the following items:
 - a. The time and place for filing sealed proposals.
 - b. The time and place sealed proposals will be opened and considered on behalf of the school district.
 - c. The general nature of the public improvement on which bids are requested.
 - d. In general terms, when the work must be commenced and completed.
 - e. That each bidder shall accompany the bid with a bid security and as specified by the school district.
 - f. Any further information which the school district deems pertinent.
 - g. Notice to bidders may provide that bids will be received for the furnishing of all labor and materials and furnishing or installing equipment under one contract, or for parts thereof in separate sections. (26.7)

- C. Require bid security.
- Each bidder shall accompany its bid with a bid security as security that the successful bidder will enter into a contract for the work bid upon and will furnish after the award of contract a faithful performance of the contract, in an amount equal to 100% of the amount of the contract. (26.8)
 - The bid security shall be in an amount fixed by the school district, and shall be in the form of a cashier's check or certified check drawn on a state-chartered or federally chartered bank, or a certified share draft drawn on a state-chartered or federally chartered credit union, or the school district may provide for a bidder's bond with corporate surety satisfactory to the school district. The bidder's bond shall contain no conditions except as provided in Iowa Code 26.8.
 - The school district shall fix the amount of bid security prior to ordering publication of the notice to bidders and such amount must equal at least 5%, but shall not exceed 10%, of either the estimated total contract cost of the public improvement or the amount of each bid. (26.8)
 - When opening and considering bids, the date and time that each bid is received by the school district, together with the name of the person receiving the bid, shall be recorded on the envelope containing the bid. All bids received after the deadline for submission of bids as stated in the project specifications shall not be considered and shall be returned to the late bidder unopened. The school district shall open, announce the amount of bids, and file all proposals received, at the time and place specified in the notice to bidders. (26.10)
- D. By resolution, the school district will award the contract for the public improvement project to the lowest responsive, responsible bid submitting a sealed proposal. All bids may be rejected if not satisfactory and new bids requested. (26.9 and 73A .18)
- E. The school district shall report the results of the bidding with the school board's recommendation to the next regular school board meeting or at a special school board meeting called for that purpose. (26.11)

Steps in a School Bond Election

Step Ten: Construction

Project procurement in the public sector for the state of Iowa is based on a design / bid / build process, in which the lowest responsible and responsive bidder is awarded the contract. Bidding guides and manuals are available at this website: <http://www.mbionline.com/bidding-guides-manuals>.

The board should insist on regular and frequent inspections by the architect. No changes in the plans or specifications should be made without a written change order signed by the architect.

On large projects, the board may employ a "clerk of the works" also called a construction manager, to work with the contractors and architects to see that the plans and specifications are being followed. See Appendix B for selecting a construction manager.

Finally, the board should instruct its secretary to pay for work completed and for materials received, as approved by the architect.

Steps in a School Bond Election

Step Eleven: Completion

After the building is completed, the board should hold an open house to give the public a chance to view and inspect the new facility.

Steps in a School Bond Election

Appendix A – Selecting an Architect

Design Competition

The district compensates several architectural firms for designing and planning a building before any firm is hired. This method is time-consuming, expensive and rarely used.

Direct Appointment

The board selects an architectural firm on the basis of its knowledge of the firm's reputation, experience, ability and past performance.

Comparative Selection

- A. The board contacts a number of architectural firms and informs them of the general nature of the project and inquires whether an architect from the firm is interested in competing for the commission.
- B. All interested architects are asked to submit detailed information about their firms to the selection committee for review. The information submitted should include:
 1. The name, address and type of organization.
 2. A brief history of the firm, its record of growth, types of work and any specialties.
 3. A list of the key staff members and the professional background of each.
 4. A list of projects completed in recent years, including type, size, cost, location and date.
 5. A list of references, including clients, contracts and financial institutions.
 6. A statement of policy for the handling of the project, participation of key staff, assignment of personnel, engineering services and other special services.
 7. A copy of the firm's brochure, plus plans and photos of completed projects.

- C. After reviewing the submitted information, the board should select three or four architects for personal interviews. The interview schedule, allotting the same amount of time for each architectural firm, should be available to all concerned parties.
- D. After the interviews, the selection committee should visit the home office and the completed projects of each architect before it makes the final selection.

Listed below are additional resources you may wish to look at about architects.

<http://architectfinder.aia.org/>

<http://network.aia.org/AIA/CommitteeonArchitectureforEducation/Home/Default.aspx>

<http://www.greenschoolbuildings.org/Homepage.aspx>

Steps in a School Bond Election

Appendix B - Selecting an Construction Manager

Direct Appointment

The board selects a construction management firm on the basis of its knowledge of the firm's reputation, experience, ability and past performance.

Comparative Selection

- A. The board contacts a number of construction management firms and informs them of the general nature of the project and inquires whether an architect from the firm is interested in competing for the commission.
- B. All interested construction management firms are asked to submit detailed information about their firms to the selection committee for review. The information submitted should include, but not be limited to:
 - 1. The name, address and type of organization.
 - 2. A brief history of the firm, its record of growth, types of work and any specialties.
 - 3. A list of the key staff members, with the professional background of each.
 - 4. A list of educational projects completed in recent years, including type, size, cost, location and date.
 - 5. A list of references, including clients, contracts and financial institutions and architects.
 - 6. A statement of their construction management approach and proposed services, including the assignment of personnel and other special services.
 - 7. Past record of performance of the firm regarding quality of work, ability to work within budget constraints, ability to meet schedules, and follow-up on building problems after substantial completion.
 - 8. A copy of the firm's brochure, plus plans and photos of completed projects.

- C. After reviewing the submitted information, the board should select three or four construction management firms for personal interviews. The interview schedule, allotting the same amount of time for each firm, should be available to all concerned parties.
- D. After the interviews, the selection committee should visit the home office and the completed projects of each construction manager before it makes the final selection.

Listed below are additional resources you may wish to look at on construction management.

<http://www.edfacilities.org/search/index.cfm>

<http://www.cmaanet.org/>

Steps in a School Bond Election Appendix C - Additional Resources

The following links will provide you with resources in planning and constructing a school.

<http://www.edfacilities.org/ir/irlinks.html#orgs>



Gregg Cruickshank <gcruickshank@sidney.k12.ia.us>

Fw: Sidney - bleachers

Raymond Moreland <rpmoreland@hotmail.com>
 To: Gregg Cruickshank <gcruickshank@sidney.k12.ia.us>

Wed, Dec 14, 2016 at 5:40 PM

From: Troy Graen <troygraen@gmail.com>
Sent: Tuesday, December 13, 2016 9:37 PM
To: Raymond Moreland
Subject: Re: Sidney - bleachers

Hello Ray, sorry it took me a while to get back to you. I had to track down that specific nosebeam. I found two of them, so if necessary, we will replace both.

As requested, I broke down the bid into a few categories:

1. Replace front row nosebeam (main structural member), add front row outrigger wheels for stability. Replace 10-15 rolling frame wheels, fix handicap area by adding gusset and wheel to displace weight, align row locks, grease entire section.

\$2200

2. Replace seats on entire section (80 seats- student area- all rows) 80 seats at \$70/ removed and installed.

\$5600

3. Replace all seats on one side or the other, or both \$70/ *950 seat capacity*

4. Tie all sections together with splice plate to avoid gap in sections, add riser plate also. Motorize all 4 sections with floor friction motors, run all internal wiring. 4 x 4 rollers throughout, install pendant controller wherever desired. \$6500

5. Motorize both sides \$13,000.

If we motorize both sides or one, we will do a complete maintenance update which includes replacing 20-100 rolling frame wheels, 30-40 row locks, re-anchor wall mounts, replace broken side rail brackets and replace any missing nuts/bolts.

I can drop off or ship a seat that is appropriate for this type of bleacher. Color choice?

6. Hand rails in aisles (16-18 each) at \$200 each installed.

Thanks for the opportunity and I look forward to your response.