



2023 RSAI ANNUAL MEETING

October 17, 2023

**FFA Enrichment Center, DMACC Campus
Ankeny, IA**

4:30 – 7:30 pm



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rsaia.org

RSAI Annual Meeting Agenda

October 17, 2023

4:30 – 7:30 pm

FFA Enrichment Center, DMACC Campus, 1055 SW Prairie Trail Parkway, Ankeny, Iowa 50023
(There will be a working dinner during the meeting)

1. Call Annual Meeting to Order: *Paul Croghan, RSAI Leadership Group Chair*
2. Approval of the Agenda
3. Introduction of RSAI Leadership Group & Meeting Attendees (share your name, role, district and something you love about rural schools)
4. Annual Meeting Business: *Dan Peterson, Secretary/Treasurer, RSAI Leadership Group*
 - 2022-23 Annual Audit
 - 2023-24 Budget & Professional Advocate Payment
 - 2023-24 RSAI Membership Dues
5. Amendments to Bylaws: *Scott Williamson, RSAI Legislative Committee Chair*
6. Report Results of Election of SE Region Representative to the Leadership Group for a three-year term through Sept. 2026. (Welcome to Dan Maeder, Davis County CSD)
7. Election of RSAI At-Large Representative to the Leadership Group for the expiring three-year term, through Sept. 2026 (Currently held by Scott Williamson, Eddyville-Blakesburg-Fremont CSD)
8. (5:15pm) Presentation on “Shrink Smart”: *David Peters, Professor and Extension State Specialist, Rural Policy and Rural Sociology, College of Agricultura and Life Sciences, Iowa State University*

[short break for meal at 5:45pm]
9. 2024 Session Preview: *Margaret Buckton & Dave Daughton, RSAI Advocates*
10. Report of the Aug. 10 Legislative Committee Meeting: *Scott Williamson, Legislative Committee Chair*
11. Discussion and Vote to approve RSAI Priorities for the 2024 Legislative Session (simple majority of member districts participating, one vote per member district): *Scott Williamson, Legislative Committee Chair*
12. Focus Area Prioritization: *Margaret Buckton & Dave Daughton*
13. Press Release
14. Adjourn (*please note: RSAI Leadership Group convenes short organizational meeting upon conclusion of the RSAI Annual Meeting*)



RSAI Essential Values

(Considerations when Formulating Positions on Legislative Issues)

Background: The following themes provide a concise 30,000-foot view to help define the organization and drive lobbying responses to proposals outside the boundaries of defined RSAI legislative priorities.

- **Students First:** State policies and resources should be designed to support schools in providing equal opportunities and success for students in **all districts of all sizes and locations**.
- **State Mandates:** Any new mandates ought to be founded on a principle of state public purpose. If the state compels school district action, the costs of that action must be initially funded and continually supported with a long-term sustainability plan.
- **Flexibility:** In education policy, one size does not fit all school districts, classrooms or students. District leaders need maximum flexibility to provide a great education to all students. The State's role is to define what outcomes are necessary for all students, leaving flexibility to schools in expenditures and policy to best determine how to deliver those intended outcomes. School districts should be trusted to exercise local authority via Statutory Home Rule.
- **Recognize Need and Capacity:** Formulas for funding should be based on student needs rather than exclusively defined based on enrollment. Per pupil funding alone does not recognize the challenge of maintaining capacity for supporting and improving education during continuous enrollment decline.
- **School General Fund Revenues Drive Instruction:** General Fund dollars pay for education. Any inequities on the expenditure side of the General Fund deprive districts of resources to pay for education. School transportation costs above the state average are a prime example.
- **Local Control:** Local leaders make the best decisions for students, especially when they have adequate flexibility and resources to make those decisions. If local stakeholders don't agree, elections have consequences. The State should exhaust other tools to correct local district mistakes when they believe those happen, rather than legislating for all districts (such tools may include but are not limited to DE review, set accreditation expectations, AEA support, SBRC oversight, etc.)
- **State Program Sustainability:** Funding for state initiatives should be defined and planned, including a plan for adequately funding the basic cost of education along the way, while defining sustainable sources of revenue for new state reforms and initiatives.
- **School Sustainability:** Decisions about school sustainability should be based on the inability to deliver student success rather than assumptions about the size of a school district. Sharing, reorganization, consolidation and dissolution decisions are best made locally. The State provides support through the provision of incentives to help eliminate barriers to those conversations.



RSAI Leadership and Contact Information

RSAI Professional Advocates

Margaret Buckton, margaret.buckton@rsaia.org, cell: (515) 201-3755, office: (515) 251-5970

Dave Daughton, dave.daughton@rsaia.org, phone: (641) 344-5205

2022-23 RSAI Leadership Group

The RSAI Leadership Group is comprised of representatives from all four regions of Iowa, plus three at-large members.

- Paul Croghan, CAM/Nodaway Valley CSD, Superintendent, (Chair, SW Region 3 Director), paul.croghan@rsaia.org
- Scott Williamson, Eddyville-Blakesburg-Fremont CSD, Superintendent, (Vice-Chair, At-large Director), scott.williamson@rsaia.org
- Dan Peterson, Central DeWitt CSD, Superintendent, (Secretary/Treasurer, At-large Director), dan.peterson@rsaia.org
- Justin Daggett, Manson NW Webster CSD, Superintendent, (NW Region 1 Director), justin.daggett@rsaia.org
- Brent Jorth, Central Lyon CSD, Superintendent, (At-large Director), brent.jorth@rsaia.org
- Dan Maeder, Davis County CSD, Superintendent, (SE Region 4 Director), dan.maeder@rsaia.org
- Nick Trenkamp, Central CSD, Superintendent (NE Region 2 Director), nick.trenkamp@rsaia.org

2023-24 RSAI Legislative Committee

The RSAI Legislative Committee is comprised of the at-large Leadership Group members, plus at least one representative per AEA within the four RSAI regions, elected at the Regional Meetings.

- NE (Central Rivers AEA) - Jay Marley, Tripoli CSD, Superintendent
- NE (Keystone AEA) - Barb Schwamman, Osage CSD and Riceville CSD, Superintendent
- NW (Central Rivers AEA) - Ken Kasper, Garner Hayfield Venture CSD, Superintendent
- NW (Northwest AEA) - Mike Pardun, Denison CSD and Schleswig CSD, Superintendent
- NW (Prairie Lakes AEA) - Brian Johnson, Southeast Valley CSD, Superintendent
- SE (Central Rivers AEA) - Rich Schulte, Montezuma CSD, Superintendent
- SE (Grant Wood AEA) - Mark Dohmen, North Cedar CSD and Olin CSD, Superintendent
- SE (Great Prairie AEA) - Mark Taylor, Centerville CSD, Superintendent
- SE (Heartland AEA) - Michelle Havenstrite, PCM CSD, Superintendent
- SE (Mississippi Bend AEA) - Mike Van Sickle, Louisa-Muscatine CSD, Superintendent
- SW (Green Hills AEA) - Deron Stender, Creston CSD, Superintendent
- SW (Heartland AEA) - Sharon Dentlinger, Interstate 35 CSD, Superintendent
- At-Large - SE (Great Prairie AEA) - Scott Williamson, Eddyville-Blakesburg-Fremont CSD, Superintendent (Committee Chair)
- At-Large - SE (Mississippi Bend AEA) - Dan Peterson, Central DeWitt CSD, Superintendent
- At-Large - NW (Northwest AEA) - Brent Jorth, Central Lyon CSD, Superintendent



Memo re Financial Statement Audit

June 30, 2023

TO: RSAI Leadership Committee
FROM: Dan Peterson RSAI Secretary/Treasurer
DATE: September 17, 2023
RE: RSAI Financial Statements for the Fiscal Year Ended June 30, 2023

1. SUMMARY

Rural School Advocates of Iowa (RSAI) concluded its most recent fiscal year on June 30, 2023. During the 2022-23 fiscal year, RSAI consisted of 177 member districts and the addition of all of Iowa's Area Education Agencies as Affiliate Members. Membership of 177 districts is up from 158 members during FY 2022, and 120 members during FY 2021. Revenues for the fiscal year totaled \$143,400 which came 95% from memberships and 5% from corporate sponsorships. Total expenses for the fiscal year were \$116,570, with payments for association management and professional advocate services totaling \$100,000. Net revenue for the fiscal year was positive \$26,830, allowing RSAI to add to organizational reserves. RSAI assets as of June 30, 2023 totaled \$70,228. Due to the limited number of transactions during the fiscal year, it was decided by the RSAI Leadership Group to again forego the expense of a formal external audit and instead conduct an internal review of the financial transactions.

2. SCOPE

As RSAI Treasurer, I have conducted an internal review of the financial transactions of the Rural School Advocates of Iowa (RSAI). The time period covered by this review is July 1, 2022 to June 30, 2023. In my opinion, the internal review procedures conducted are sufficient to evaluate the accuracy of the financial report that follows this memo.

2. SOURCES OF INFORMATION

RSAI day-to-day financial transactions are performed by staff members of Iowa School Finance Information Services (ISFIS). The financial review was conducted on the basis of questionnaire, inquiry, observation, and verification of supporting documentation and identified processes.

3. FINDINGS

After the internal review was conducted, I have identified no significant findings requiring adjustments to the financial statements presented.



RSAI Financial Statements

Rural School Advocates of Iowa (RSAI)
Interim Balance Sheet
June 30, 2023

Current Assets

Cash - Wells Fargo Checking	68,433	
Accounts Receivable	-	
Prepaid Items	1,795	
Total Current Assets		70,228

Other Assets

Other	-	
Total Other Assets		-

Total Assets

70,228

Liabilities

Accounts Payable	-	
Advances from/Amounts Due to ISFIS	994	
Deferred Income	21,700	
Total Liabilities		22,694

Equity

Retained Earnings	20,703	
Net Income	26,830	
Total Equity		47,534

Total Liabilities & Equity

70,228



Rural School Advocates of Iowa (RSAI)
Interim Income Statement
For the Twelve Month Ended June 30, 2023

	YTD Actual June 2023	Annual Budget 2022-23	
<u>Income</u>			
Membership Dues	128,400	107,250	
Affiliate Membership Dues	8,250	6,750	
Corporate Sponsorships	6,750	8,000	
Other	-	-	
Total Income	<u>143,400</u>	<u>122,000</u>	
<u>Expenses</u>			
Advertising/Promotion	1,398	1,500	
Postage	725	750	
Supplies/Printing/Signage	2,612	1,500	
Computer Hardware/Software	915	860	
Insurance	777	750	
Dues, Subs & Ref Matls	750	750	
Consultation Fees - Assoc Mgmt/Professional Advocate	100,000	100,000	
Consultation Fees - CPA Services	1,500	-	
Legal Fees	-	-	
Bank Fees	2	-	
Hosting, Domain & Website Fees	444	755	
Professional Development	794	1,000	
Travel Expenses	594	1,750	
Annual Conference	4,507	2,300	
Regional Meetings	852	1,000	
Program Fees - NASDTEC	700	700	
Other	-	8,385	
Total Expenses	<u>116,570</u>	<u>122,000</u>	
Net Income	<u><u>26,830</u></u>	<u><u>-</u></u>	



RSAI Budget

	Budget 2023-24
<u>Income</u>	
Annual Meeting	\$ -
Membership Dues	\$ 128,400
Affiliate Membership Dues	\$ 8,250
Corporate Sponsorships	\$ 6,750
Regional Meetings	\$ -
Other	\$ -
Total Income	\$ 143,400
<u>Expenses</u>	
Advertising/Promotion	\$ 1,500
Postage	\$ 750
Supplies/Printing/Signage	\$ 2,500
Computer Hardware/Software	\$ 915
Insurance	\$ 775
Dues, Subs & Ref Matls	\$ 795
Consultation Fees - Assoc Mgmt/Prof Advocate	\$ 121,890
Consultation Fees - CPA Services	\$ 1,500
Legal Fees	\$ -
Bank Fees	\$ -
Hosting, Domain & Website Fees	\$ 750
Professional Development	\$ 800
Travel Expenses	\$ 4,700
Annual Meeting	\$ 5,000
Regional Meetings	\$ 1,500
Program Fees - NASDTEC	\$ 700
Other	\$ -
Total Expenses	\$ 144,075
Net Income	\$ (675)



RSAI Membership Pricing Schedule (July 1, 2023 – June 30, 2024)

RSAI Standard District Pricing: \$750 per school district

Whole Grade Sharing Arrangement: \$550 per district (if both join)
(approx. 25% discount)

Final Year of WGS before Reorg: \$375 per district (if both join)
(approx. 50% discount)

DISCOUNTS

District with Negative Spending Authority 100% discount off standard pricing
(fee waived with approval from RSAI Leadership Group for financial hardships)

ISFIS Board/Policy Hosted Website \$100 discount off standard pricing
(discount paid by ISFIS on district's behalf)

AFFILIATE MEMBERSHIP

\$750 per government entity, AEA or
community college entity



RSAI BYLAWS

Name: The name of the organization shall be the Rural School Advocates of Iowa and shall be referred to below as "RSAI".

Mission:

RSAI will advocate for students in rural schools to assure a fair, equal, and quality education.

Vision:

Member schools will collaborate to promote legislation that strengthens rural education for students, by;

1. Educating others about the value of rural education to the state's economy and future of Iowa as an educational leader in the nation and the world and unique challenges rural schools and communities face;
2. Building the capacity and understanding of other groups with similar interests on legislative and educational issues to build a stronger voice;
3. Securing adequate resources, academic and financial, to provide first class educational opportunities for students; and
4. Maintaining local control through the flexibility and authority of locally elected School Boards.

Membership:

Membership of RSAI shall be open to School Districts in Iowa that share the values and mission of RSAI in advocating for students in rural schools to assure a fair, equal, and quality education. Affiliate membership is extended to other organizations/entities sharing the values and mission of RSAI, as approved by the RSAI Leadership Group. Input from affiliate member organizations is valued but such organizations are non-voting affiliate members of RSAI. Affiliate membership shall be open to Governmental Entities, AEAs, Community Colleges, and Universities.

Membership in RSAI shall not be considered in lieu of membership in other organizations serving students in the state of Iowa. RSAI will work closely with all organizations sharing its Mission, Vision and Legislative priorities.

Member School Districts shall be responsible for advocating for students; creating local networks to support RSAI identified Legislative priorities; and assisting Legislators in gaining a better understanding of rural student and school needs.

Member School Districts are encouraged to create a Liaison responsible for Legislative advocacy from among its Board members to fulfill its RSAI responsibilities and act as a direct contact within the School District for RSAI.

Membership dues shall be provided each year at the RSAI Annual Meeting. Dues shall be the same for all member school districts regardless of certified enrollment. However, school districts engaged in whole grade sharing prior to the final year preceding reorganization may receive a discount of 25% each. Districts sharing in the final year prior to reorganization may each receive a 50% discount. In both cases, the two districts may determine the ratio of responsibility for payment. The Leadership Group may waive dues for districts with financial hardship. Affiliate membership fees shall be set by the Leadership Group for each year, and shall not be less than school district membership dues.

Member School Districts can withdraw membership at any point through written notification to the RSAI Leadership Group. Dues paid are non-refundable.

Member School Districts shall be entitled to participation in RSAI as follows in these ~~By-Laws~~Bylaws.

Voting:

Unless otherwise specified in these ~~By-Laws~~Bylaws, all voting is to be done in person and may be done electronically if identity of the individual is determined. Active electronic attendance is permitted via internet technologies ~~and shall be considered in person for purposes of voting~~, or in response to survey or other electronic communication as approved by the RSAI Leadership Group. Proxy voting by School Districts is not allowed. Each District in attendance shall be entitled to one vote on all issues addressed at the RSAI Annual Meeting or as needed between RSAI Meetings as determined by the RSAI Leadership Group.

Commented [J1]: Recommended change from NE Regional Meeting

Quorum:

Unless otherwise specified in these ~~By-Laws~~Bylaws, Quorums are not required.

Meeting Procedures:

The latest version of Roberts Rules of Order shall be used to determine procedural questions except as otherwise directed by the membership.

Agendas:

Unless otherwise specified in these ~~By-Laws~~Bylaws, agendas must be forwarded to participants no later than 7 days prior to meetings and must include a date, time and location in addition to actions required at each meeting as per these ~~By-Laws~~Bylaws. Unless otherwise specified, creating agendas will be the joint responsibility of the Secretary/Treasurer and Chair of the Leadership Group and must be posted by the Secretary/Treasurer or the Secretary/Treasurer's designee.

Vacancies:

If the Leadership Group determines it is unnecessary to appoint to fill a vacancy, a vacancy shall remain vacant until the next election cycle.

Representation:

RSAI shall strive for diversity in representation of all leadership and elected positions within RSAI, including both elected Board members and Superintendents.

Good Standing:

Eligible officer positions can only be held by school board members and superintendents in good standing with their district's RSAI membership. Changes in status such as but not limited to failure of Board members to gain reelection to their local School Board or changes in School District employment to a nonmember district or outside of regional boundaries for the office in the case of Superintendents shall be deemed vacant.

RSAI Regions:

Member School Districts shall be divided into 4 Regions known as RSAI Regions. These Regions shall be defined as per the map in Appendix A - "RSAI Regions". Should a merger between one or more districts occur and both districts do not occupy the same RSAI Region, the reorganized district shall be included in the RSAI Region of the district which had the greatest land area prior to the reorganization.

RSAI Regions shall meet annually ~~in the summer~~ and as deemed appropriate and necessary by the RSAI Leadership Group. Each District shall be entitled to one vote on all issues addressed at RSAI Regional Meetings. A shared superintendent present at the meeting may cast one vote for each member district he/she represents.

The RSAI Regional ~~meeting~~ Meeting participants shall elect an RSAI Region Representative to serve a term as specified later in these ~~By-Laws~~ Bylaws on the RSAI Leadership Group and shall act as Chair of the Regional ~~meetings~~ Meetings during their term. The RSAI Region Representative will be responsible for making all arrangements necessary for RSAI Regional ~~meetings~~ Meetings during their term, ensuring that staff share an Agenda with members at least 30 days in advance of the meeting.

The RSAI Regional ~~meeting~~ Meeting participants shall elect at least one Liaison but no more than one per AEA within the RSAI Region to the RSAI Legislative Committee. It shall be the responsibility of the RSAI Region Liaison, with assistance by staff, to present the RSAI Region's Legislative priorities to the Legislative Committee meeting each year. The term of office of the RSAI Region Liaison shall be one year.

At the RSAI Regional ~~meeting~~ Meeting, amendments to these ~~By-Laws~~ Bylaws may be presented for consideration. In order for an amendment to move forward to the RSAI Legislative Committee for consideration, a 2/3 majority is required.

At the RSAI Regional ~~meeting~~Meeting, Legislative priorities for the upcoming Iowa Legislative Session shall be established and forwarded for consideration to the RSAI Legislative Committee. Determination of Legislative priorities shall be based on a simple majority vote.

RSAI Legislative Committee:

RSAI Region Liaisons shall gather with the At-Large Leadership Group members as the RSAI Legislative Committee annually, but in no event later than 4 weeks prior to the RSAI Annual Meeting.

The Legislative Committee will select a Chair and Vice-Chair/Secretary from among its members to conduct the RSAI Legislative Committee meeting. The term of office for both will be one year.

The RSAI Legislative Committee will be responsible for reviewing, amending as necessary and finalizing the Legislative Priorities as identified at the RSAI Regional ~~meetings~~Meetings.

The RSAI Legislative Committee shall present a set of recommended Legislative Priorities for consideration at the RSAI Annual Meeting. The recommended legislative priorities are presented as a draft with responsibility for finalizing the determination of RSAI's legislative priorities on the body of the RSAI ~~annual-Annual meeting-Meeting~~ participants.

The RSAI Legislative Committee shall present any Amendments to these ~~By-Laws~~Bylaws for consideration at the RSAI Annual Meeting. In order for an amendment to be included on the agenda at the RSAI Annual meeting for consideration, a 2/3 majority of the RSAI Legislative Committee is required. Such proposed amendment shall be submitted to the RSAI Leadership Group at least 14 days prior to the Annual meeting.

RSAI Annual Meeting

All member School Districts shall gather annually as determined by the Leadership Group. This meeting shall be known as the RSAI Annual Meeting. An Agenda of the Annual Meeting shall be sent to all member school districts no less than 30 days in advance of the Annual Meeting by the RSAI Leadership Group Chair.

At the RSAI Annual meeting, three At-Large members will be elected for membership in the RSAI Leadership Group who in conjunction with the 4 RSAI Region Representatives shall comprise the RSAI Leadership Group. RSAI Region Representatives and At-Large members will take office at the conclusion of the Annual meeting in the year in which they were elected.

At the RSAI Annual Meeting, members will approve a slate of Legislative Priorities for the upcoming State Legislative Session.

At the Annual Meeting, amendments to these ~~By-Laws~~Bylaws may be adopted by a 2/3 majority

vote.

At the Annual Meeting, the budget for the upcoming fiscal year shall be shared with membership. The budget shall include the payment for association member services including advocacy for the upcoming year.

At the Annual Meeting, the RSAI Leadership Group Secretary/Treasurer shall present an Annual Audit or an annual financial report for the most recently completed fiscal year.

RSAI Leadership Group:

As specified, 4 Region Representatives and 3 At-Large members shall comprise the RSAI Leadership Group.

The Election cycle shall be maintained to ensure continuity of a rotating three-year cycle:

- RSAI SW Region & 1 At-Large
- RSAI NE Region & 1 At-Large
- RSAI NW Region, RSAI SE Region & 1 At-Large

It shall be the responsibility of the RSAI Leadership Group to direct operations of RSAI; select, retain and evaluate the services of the Professional Advocate; establish dues for the upcoming fiscal year, coordinate local network efforts with member school districts and the Professional Advocate; create and conduct School District network training; conduct the RSAI Annual Meeting; coordinate annual legislative activities and encourage membership in affiliate associations where appropriate.

Members of the RSAI Leadership Group will select the following positions from among its membership by vote annually: Chair, Vice-Chair and Secretary/Treasurer.

It shall be the responsibility of the Chair to create agendas for meetings as required in these ~~By-Laws~~Bylaws; act as the official spokesperson for RSAI; ~~sign warrants~~ and preside at meetings.

It shall be the responsibility of the Vice-Chair to act as temporary Chair when the Chair is absent, or in the case of the Chair vacating the office, to act as Chair until the next election of officers.

It shall be the responsibility of the Secretary/Treasurer to monitor all appropriate records and ~~warrants or drafts amounts deposited into or with~~drawn from the ~~bank account(s)~~treasury; conduct an annual audit or annual financial report for presentation at the Annual Meeting; maintain minutes of each meeting; and file (or confirm that staff has filed) any reports necessary with the Iowa Secretary of State and State Legislature regarding non-profit status and lobbying activities as required.

A majority of members is required in order to conduct business at the RSAI Leadership Group

Commented [J2]: The term "warrant" and "treasury" are more governmental terms than nonprofit terms.

The original intent likely was to say that the Chair will be responsible for approving payment of all entity bills and sign the checks. However, due to challenges with physically signing checks, this responsibility has always been delegated to staff.

Below, we say that it is the responsibility of the Secretary/Treasurer to monitor warrants or drafts drawn from the treasury. Internal accounting policies designate the check signers and controls processes.

meetings.

A vacancy in the Leadership Group may be filled by the Leadership Group at its next regular meeting or subsequent meeting by majority vote. Vacancy of a Region Representative must be filled by a member school district in the same RSAI Region. At-Large vacancies may be replaced by any member school district. Notice of vacancy and intent to appoint a replacement shall be sent to all appropriate member districts soliciting interest.

The RSAI Leadership Group shall be responsible for determining legislative positions responding to legislation that arises between annual meetings that the RSAI Legislative Committee and list of legislative priorities did not anticipate or address.

The RSAI Leadership Group may appoint Committees as deemed necessary. These Committees shall be tasked with a specific objective. The duration of the Committee shall be limited and end with a report to the Leadership Group on a specific date to be established at their inception. Committees shall make recommendations to the RSAI Leadership Group, but shall not adopt policy, take independent action or endorse any entities that will do either.

Regular meetings of the RSAI Leadership Group shall occur monthly or as otherwise directed. A meeting schedule of all meetings shall be developed by the RSAI Leadership Group for the year following the Annual Meeting. At the discretion of the RSAI Leadership Group, regular meetings may be held electronically but must include an interactive format and may be recorded.

An Agenda including the time and location of a Regular meeting shall be forwarded to all members of the Leadership Group at least 1 week in advance of the meeting by the Chair of the Leadership Group or the Chair's designee.

Adopted: January 18, 2014

Amended: October 25, 2014

Amended: June 15, 2015

Amended: October 12, 2016

Amended: October 25, 2017

Amended: October 24, 2018

Amended: October 21, 2020

Amended: October 26, 2021

Amended: October 25, 2022

Proposed Changes: October 17, 2023



2024 RSAI Legislative Priorities - Draft

Adequate School Resources: the increase in SSA provides resources for Iowa schools to deliver an educational experience for students that meets the expectations of Iowa parents, communities, employers and policymakers. **Iowa's school foundation formula must maintain balanced state and local resources, be predictable, minimally exceed inflation, allow schools to compete for labor, and assure adequate time for budget planning and staffing.**

What schools can deliver is dependent on the level of funding provided, which begins with the 2024-25 school year and requires a consistent and sustainable commitment:

- **World-Class Education:** an investment of at least 10% SSA (\$763 per pupil, or \$4.23 per day of 180 days of instruction) would position Iowa schools and AEAs to deliver a world-class education, lower class sizes, attract and retain qualified staff, increase and individualize internships and other workforce experiences for students, and provide programs to close achievement gaps. Iowa per pupil expenditures, ranked 29th in the nation in 2021, fall \$1,581 short of the national average (*source: NCES Finance Tables, May 2023*), which does not meet the standard of Iowa's pride in our foundation of education, as shown on the Iowa state quarter. The 10% investment would be a down payment in closing Iowa's lagging funding gap, unless other states commit even more to their students' education.
- **Sustain Current Status:** an investment of at least 5% (\$382 per pupil, or \$2.12 per day of 180 days of instruction) would position school districts and AEAs to maintain current status with Iowa's competitive economy, recovering *partially* from high inflation and increased student needs.
- **Continued Erosion:** an investment of 2.5% (\$191 per pupil, or \$1.06 per day of 180 days of instruction) will *partially* cover expected increased costs of the next fiscal year, including staff salaries and benefits, but will require schools and AEAs to scale back, provide part-time librarians, counselors and nurses, shift some classes to online learning, or take other actions to squeeze more out of the current system in order to set a salary sufficient to retain existing staff (teachers, bus drivers, custodians, paraprofessionals) and provide a rounded course offering and programs.

Staff Shortages: In addition to sufficient SSA, strategies to rebuild Iowa's education workforce must address two areas during an unprecedented staff shortage:

Recruitment: to rebuild the pipeline of interest into education, the Legislature, BOEE and DE must provide additional flexibility for school districts to provide hiring incentives, ongoing investment in CTE programs for high school students to study and experience work in education, provide resources for grow-your-own educators and appropriate certifications including expanded intern licenses, provide means-tested tuition assistance and minimize the economic costs of unpaid student teaching, provide more loan forgiveness, and change the culture of political speech to restore education to a respected profession.

Retention: to slow the out-migration of staff from schools to other professions or retirement, the Legislature, BOEE and DE must provide maximum flexibility to hire staff to deliver great instruction; use of the Management Fund for recruitment and retention incentives, flexibility to meet offer and teach requirements, opportunities for teaching expanded courses within existing and/or competency-based licensure, institute social studies and other content generalist credentials, define a shorter bona fide retirement period for schools to hire retirees, consider tax incentives for teachers, and maintain the commitment to resources for mentoring, training and supporting staff.

Competitive and adequate compensation: school funding primarily pays for quality staff and employees to provide a great education for students. In 2019-20, Iowa ranked 28th in the nation in average teacher pay (including TLC for teacher leaders at the high end) and starting teacher pay was ranked 38th (source: *Learning Policy Institute, Understanding Teacher Compensation State by State Analysis*).

In both the short and long term, legislation, policy, and public support provide improved compensation and benefit options for educators. They must also foster respect for the education profession, which is well deserved, to attract more lowans into teaching and retain more teachers in Iowa. Only when we are able to do this will Iowa be able to have adequate numbers of quality individuals educating and supporting our children.

Public School Priority: as Iowa public schools will always be the first choice of most Iowa families, they must be adequately funded and supported by the State.

- 1) Education Savings Accounts, as enacted by HF 68 in 2023, require further legislation to minimize the impact on public students and schools.
 - a. Public schools should be relieved of the mandate to reimburse private school parents or provide transportation for private schools.
 - b. Private school students returning to public school after the October enrollment count date should be funded timely (included in the enrollment count and budget for the next year or added to the class action requests for SBRC modified supplemental amount similar to on-time funding spending authority.)
 - c. ESA (and open enrollment) applications should be submitted and approved by an annual deadline to inform both public and private schools timely for staff and budget planning.
- 2) ESAs should not be expanded to homeschool students or a weakened accreditation process expanded to more private schools.
- 3) Equity of expectations and regulations should be applied consistently to both public and private schools under an ESA environment.
- 4) Many rural school districts do not have a private school in their community today. In the future, the expansion of private online academies, the pressure for the State to support homeschooling and the profit motive to expand private schools without the corresponding costs of oversight and compliance will create lower economies of scale, compounding the challenge for small rural schools to survive rigorous State accreditation compliance.

Opportunity Equity, Increasing Student Needs and Mental Health: resources should be based on at-risk need, in addition to enrollment. All school boards should have the opportunity to access up to 5% dropout prevention funding. School districts should be granted spending authority for FRPL-waived fees. Iowa should study the impact of poverty on educational outcomes and best practices of other states in closing associated achievement gaps, leading toward a significant and urgent update to Iowa's School Foundation Formula in funding programs for Iowa's neediest students. Investments in programs for at-risk students prepare them for full participation in the workforce, improve school safety for all students, minimize tax increases to remediate social costs later and improve outcomes for students and families. Students in rural areas are often distanced from services. Iowa must continue to address needed access to funded community mental health services for children and the shortage of mental health professionals statewide. The State should provide resources for local districts to train school staff in mental health first aid and awareness and build community capacity to collaborate for a collective solution to the increasing mental health needs of children.

Quality Preschool: funding of quality statewide voluntary preschool should be set at the 1.0 per pupil cost for full-time or prorated proportionally. The formula should include PK protections against budget and program impacts of preschool enrollment swings like they do for K-12 (budget guarantee/on-time spending authority). Full-day programming increases the opportunity for parent workforce participation, allows Iowa's limited childcare workforce capacity to focus on younger children, prevents later special education consequences, improves literacy and prepares students for learning. Although all students benefit from quality preschool, Iowa's low-income and non-English speaking students face barriers to half-day programs, making them even more at risk of lower long-term achievement.

Sharing Incentives/Efficiencies: Whole Grade Sharing, Reorganization and Operational Sharing Incentives should be extended. The 21-student cap should be increased to allow access to new flexibility. Weightings should be sufficient to encourage and support sharing opportunities, with a 3-student weighting at a minimum per position. Reductions in weightings should be restored. The addition of new positions over the last few years, such as mental health counselors, work-based learning coordinators and school resource officers, demonstrates the value of continued sharing incentives for both efficiency and student opportunity. Some positions, such as those to address mental health or school safety, should be exempted from the cap.

Local School Board Authority: locally elected leaders closest to the community are in the best position to determine the interests of students, staff, district and stakeholders. District leaders need maximum flexibility to provide a great education to all students. The Legislature, the Executive Branch and the courts should follow Iowa Code 274.3 and liberally construe laws and regulations in deference to local control.

Formula Equity: continue investments in formula equity, closing the state and district per pupil gap within ten years. Inequities in the formula, based on no longer relevant historical spending patterns over 40 years ago, must be corrected to support resources for all Iowa students.

Bond Issue Dates: the restriction of bond elections to one annual date spikes the demand for providers, architects, bonders, and construction labor, while extending the time of completion, all increasing cost to taxpayers. Bond issues, like other ballot initiatives, should be approved by a simple majority of voters.



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