winter 2020

A PUBLICATION OF THE IDAHO SCHOOL BOARDS ASSOCIATION

SLATE magazine

They've Sent An Invitation . . . Now What?

Suicide Intervention

page 34

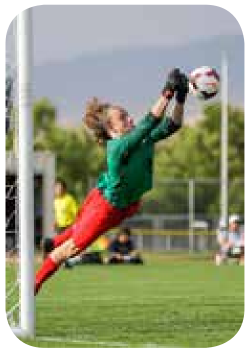
In This Issue:

ISBA IDAHO School Boards Association

IHSAA

IDAHO HIGH SCHOOL ACTIVITIES ASSOCIATION

Supporting Education Through Activities

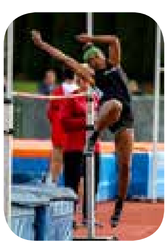



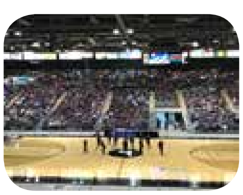
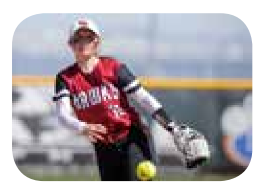
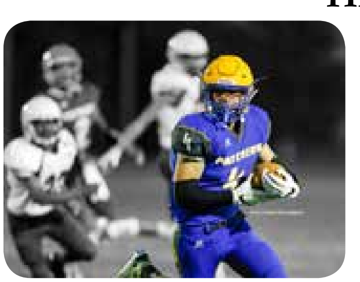


MORE THAN A GAME

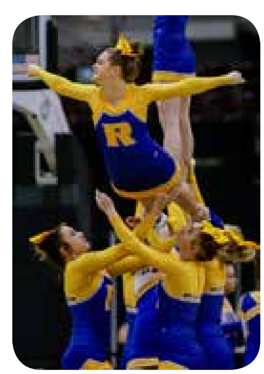
- Students involved in activities average fewer absences per year than the general student population
- Participation in high school activities is a valuable part of the overall high school experience
- Students who compete in high school activity programs achieve higher grades and have better attendance
- School activities teach lessons that include citizenship, teamwork, motivation, cooperation and self-discipline
- Those who participate in activity programs are less likely to have discipline referrals than the general student population
- High schools that offer multiple activities meet the needs of a wide variety of the student population
- High school activities are fun!





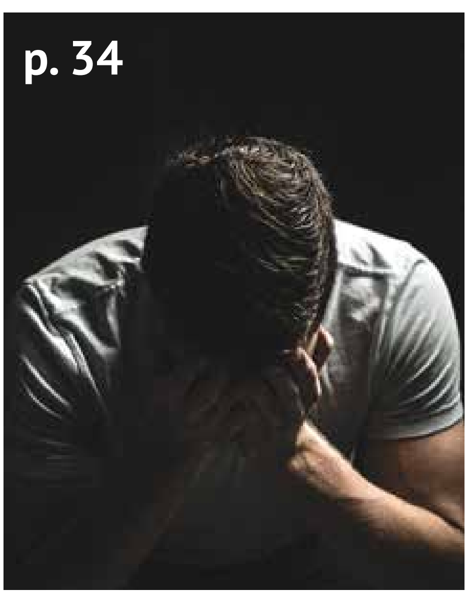




Students Now Citizens Forever



WINTER / 2020

IN EVERY ISSUE:



FEATURES:

SLATE magazine

MISSION:

Provide leadership and services to local school boards for the benefit of students and for the advocacy of public education.

VISION:

School Board leadership for excellence in Idaho public education

STANDARDS:

1. Vision and Mission
2. Continuous Improvement
3. Advocacy
4. Accountability
5. Community Engagement
6. Board Operations and Professional Development

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ISBA CALENDAR

January - March	Legislative Session • Idaho Capitol - Boise, ID
February 17	Executive Board Meeting • Grove Hotel, Boise, ID
February 17-18	Day on the Hill • Grove Hotel & Idaho Capitol • Boise, ID
April 4-6	NSBA Annual Conference • Chicago, IL
April 17-18	Executive Board Meeting • Boise, ID
May 25	Memorial Day • ISBA Office Closed

STAY CONNECTED

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IDAHO School Boards Association

If you are interested in contributing an ad or an article to the SLATE contact:

Lance Corpus
Printing & Graphics Coordinator
Email: lance@idsba.org
Phone: (208) 854-1476

2019-2020 ISBA Executive Board:

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The Idaho School Boards Association is governed by a 22-member Executive Board which includes four officers and two representatives from each of the nine regions of ISBA.

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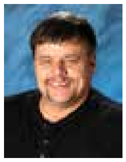
Meridian Technical Charter HS



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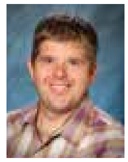

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- REGION 3
- REGION 4
- REGION 5
- REGION 6
- REGION 7
- REGION 8

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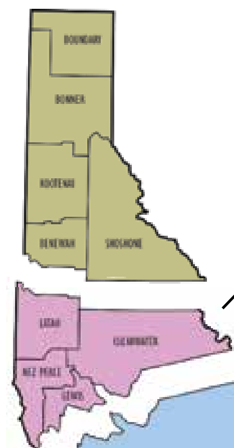
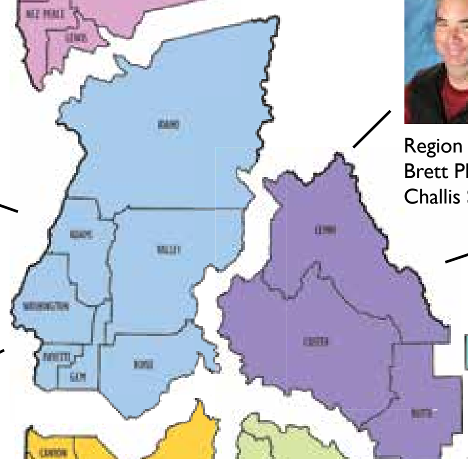


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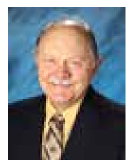

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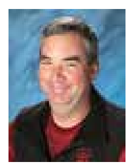

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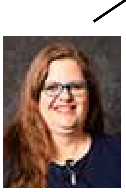

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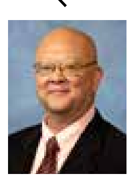

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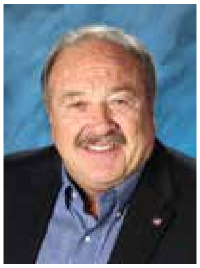


By Wally Hedrick
ISBA President

It's An Honor & Privilege

Wally Hedrick takes over as ISBA President.

It is a sincere honor and privilege for me to serve as your President for the upcoming year. As in the past, ISBA will face challenges this year involving our efforts to move our legislative priorities forward. As always, we will be supporting and opposing education related legislation offered by others depending on the impact such legislation will have on our students and educators/administrators. Along with our ability to deliver the best education possible in our district or charter. The funding formula is still in limbo, and it is anyone's guess where that might end up. But be assured that our Association will work to ensure that all districts and charters are treated fairly. State tax receipts are below state estimates and Governor Little has requested that all state agencies reduce their budgets by 1% to 2% for the current and next fiscal year. He has indicated that he will not seek a reduction in education funding at the K-12 level, which is good news. So clearly, the lack of financial resources will be a factor in this year's legislative session. Karen and Quinn work hard and endure long hours during the legislative session. The Government Affairs Committee will ask for you to contact your legislators when ISBA identifies a piece of legislation that requires our input. I hope you will take the time to provide that input when asked, as it is critical to Karen and Quinn's efforts.

The ISBA Executive Committee will have seven (7) committees besides the Government Affairs Committee (GAC) this year working on a variety of important and substantive issues.

Those committees are:

- **Professional Development & Leadership**
- **Finance & Audit**
- **Scholarship, Nominating**
- **Fiscal Advisory**
- **Executive Search**
- **Dues Review**

The Executive Committee members serve on these committees along with trustees and board members throughout the state. My thanks to each of them for agreeing to contribute their time and energy to make the committees' missions successful. I plan to discuss, in greater detail, the role of each committee in the next issue of The Slate.

If, during the course of the next year, you have any questions or would like to share some thoughts with me, please feel free to contact me at ***wallyhedrick@aol.com***. I value your input and look forward to serving all the districts and charters in the great State of Idaho. Collectively, ISBA has the strength and conviction to improve education with each and every one of our students. We must use that strength and conviction wisely and make sure we pick the legislation and legislators that we can influence. ISBA must continue to represent ALL its members and stand tall for accountability, transparency, and local governance at the district and charter level.

Thank you.

Wally Hedrick
Idaho School Boards Association

STRONG LEADERS BRING OTHERS UP

Strength comes from a solid foundation. Ours is built on the belief that people matter most. By focusing on the needs of our members – access to quality, affordable healthcare – we all rise.

Visit bcidaho.com

By Sherri Ybarra
Idaho Superintendent of Public Instruction

Idaho's New Online Report Card Finds Success, & National Recognition

Idaho's revamped online report card, already well-used by schools and community members throughout Idaho, is attracting positive attention nationwide.

Recently, Idaho was named one of three **"States to Watch"** highlighted in the December Time to Act report from the national Data Quality Campaign (DQC). And in April, the organization released a "Show Me the Data" report that highlighted Idaho as one of three states with report cards that stood out for making considerable progress.

To be recognized twice by DQC in one year is outstanding – especially considering that our online report card is only a year old.

But the most important, and gratifying, feedback we've received is from stakeholders.

Input from educators and the public played a crucial role in our efforts to make school and student data accessible, understandable, and usable to everyone. And judging by the statewide response, we're achieving our goal.

We hear frequently from district and school board leaders who are using this information to engage communities in conversations that focus on continued improvement.

continued on next page...

The most recent DQC report, **"Connecting Policy to Practice to Make Data Work for Students,"** spotlights Idaho's State Department of Education (SDE) for its effectiveness in all four of DQC's policy priorities.

- **Measure What Matters:** Idaho's report card ensures that stakeholders get a complete picture of school performance, including teacher workforce data and measures of student, parent, and staff engagement.
- **Make Data Use Possible:** Idaho aligns report card data with the needs of local leaders, enabling continuous improvement planning on the local level.
- **Be Transparent and Earn Trust:** Idaho seeks to reach all communities by providing an easy-to-navigate site with school quality data beyond what is federally required.
- **Guarantee Access and Protect Privacy:** Idaho uses varied strategies to maximize data transparency and protect student privacy, offering explanations for why certain performance data – for example, if the measured group is fewer than 10 students – must be withheld.

In April, the Data Quality Campaign singled out Idaho for making its new Report Card easier to navigate, and for offering Spanish translations and performance data from new subgroups, including students in military families, foster care, and homelessness.

A national leader in evaluating education data policy and reporting, DQC made a presentation featuring Idaho's report card during last summer's conference of the Council of Chief State School Officers.

One of the goals of our report card redesign was to reduce red tape, making it easier for schools and districts to put the focus on helping students rather than producing paperwork. DQC noted Idaho's success with that goal in the December report, noting that "state leaders have decreased the burden on local leaders and allowed for more targeted decision making."

The report card is a vital part of our accountability plan under the **Every Student Succeeds Act.** The site provides information about multiple student performance indicators, offering context in addition to the data on topics such as teacher retention and whether students are meeting grade-level expectations. Users can easily navigate the site for assessment results and a wide range of other information including school demographic information, educator workforce, enrollment, and student engagement.

It's great to get national recognition for our report card efforts, especially since we are recognized for achieving our top priority: a system that's easy to use and meaningful for parents, educators, and the community.

We're not resting on our laurels, though: We are constantly looking at ways to improve the site, both in terms of content and ease of use.

Helpful links:

The revamped state and local report card has an easy to remember online address: ***idahoschools.org***

To read the latest national DQC report highlighting Idaho, go to:
https://dataqualitycampaign.org/wp-content/uploads/2019/12/DQC-Time-to-Act-2019-FINAL.pdf

Check out the April DQC report featuring Idaho as one of three featured states at:
https://dataqualitycampaign.org/wp-content/uploads/2019/04/DQC-Show-Me-the-Data-2019-Bright-Spots.pdf

Learn more about DQC at:
https://dataqualitycampaign.org/wp-content/uploads/2019/11/DQC-Fact-Sheet-11252019.pdf

DEPARTMENT OF EDUCATION · STATE OF IDAHO ·

See DQC Idaho report card on next page...

State to Watch: Idaho

Idaho's report card redesign process included rethinking how to make the resource valuable to local leaders for continuous improvement of Idaho schools.

STATES MEASURE WHAT MATTERS BY . . .

Ensuring that stakeholders get a complete picture of school performance. Idaho is rounding out the picture of student performance on its report card by including a number of nonacademic indicators of school quality, including teacher workforce data and measures of student, parent, and staff engagement.

STATES MAKE DATA USE POSSIBLE BY . . .

Giving educators and school leaders the training and support they need to take action with data. Idaho makes certain that local schools are supported by aligning the data in its report card with the needs of local leaders. Traditionally, local leaders would collect and share data with the state education agency and then engage at the local level in continuous improvement planning. Now the report card provides data that local leaders need so they can reflect on their schools' performance and jump straight into continuous improvement planning. By equipping local leaders with the data they need and eliminating an unnecessary reporting step, state leaders have decreased the burden on local leaders and allowed for more targeted decisionmaking.

STATES ARE TRANSPARENT AND EARN TRUST BY . . .

Making sure all stakeholders understand how their schools are performing and how data is being used to help students. Idaho seeks to reach all communities by publishing a range of data about school quality, above and beyond what is federally required, in an easy-to-find and easy-to-navigate report card. The report card is translated into languages other than English and features performance data for newly required student groups, including military-connected students, students in foster care, and students experiencing homelessness.

STATES GUARANTEE ACCESS AND PROTECT PRIVACY BY . . .

Ensuring that students' information is protected even as the state is transparent about how schools are serving students. Idaho uses different strategies to display data to maximize transparency and protect student privacy. For example, the state may not report the performance of a group that has fewer than 10 students. But if this information is not reported publicly, users are able to hover over those specific fields and receive detailed explanations about why the data is not displayed. The new format gives the state flexibility to use different techniques that both ensure student privacy and provide communities with more detailed information than ever before about how schools are serving all students.

The Learning Ecosystem

FOR FAMILIES

- **Idaho PBS KIDS Channel** - 24/7 educational programs
- Science, news, and history programs for all ages
- **Literacy** and **STEM** events throughout Idaho
- **Science Trek camp** and **PBS KIDS Writers Contest**
- **Online resources** for parents at pbs.org/parents

FOR EDUCATORS

- **Teacher Community Program** in Idaho's classrooms
- **PBS LearningMedia** digital resources for educators
- **TeacherLine** professional development courses
- In-person educator **workshops** from IdahoPTV

FOR COMMUNITIES

- **American Graduate** initiative to help young people succeed in school, career, and life
- Screenings and outreach events bring new programs and national speakers to venues around Idaho
- A **Book and a Bite** - community groups providing free lunch, books, and **STEM** activities during the summer

Idaho Public Television supports the entire learning ecosystem and promotes lifelong learning by offering educational programs, activities, and resources to Idaho's communities and schools, supporting parents and teachers, and providing children equal opportunities and access to quality educational resources.

A researcher with Northwestern University analyzed 45 studies involving more than 24,000 children. She found that PBS KIDS programs, games, and local engagement:

LEAD TO LEARNING GAINS COMPARABLE TO THOSE ACHIEVED THROUGH HIGH-QUALITY PRESCHOOL

AND ARE JUST AS EFFECTIVE IN HELPING KIDS DEVELOP LITERACY SKILLS.

(Lisa B. Hurwitz, "Getting a Read on Ready to Learn Media: A Meta-analytic Review of Effects on Literacy." Child Development, Feb. 19, 2018)

IDAHO PUBLIC TELEVISION PBS

By Debbie Critchfield
President, Idaho State Board of Education

Education Task Force Report Now Available Online

After six months' worth of work including meetings held around the state, Governor Brad Little's "Our Kids, Idaho's Future task force has completed its report, and it is available online on the State Board of Education website:

https://boardofed.idaho.gov/education-initiatives/our-kids-idahos-future/

I encourage Idaho educators to make time to review the report and the task force's recommendations. The recommendations are intended to build on recent investment and progress made in K-12 education and to act as a blueprint for education investment and reform over the next five years.

The recommendations focus on aligning budgets with priorities including improving student achievement and success, enhancing school safety, supporting our rural and underserved schools and rewarding and retaining our most effective teachers.

In his recent press release, Governor Little thanked the members of the task force for,"their commitment to improving opportunities for our students to succeed in their education and their lives." He added,"Their recommendations for the basis of my education budget and policy recommendations for the 2020 legislative session and beyond."

As co-chair of the task force, I too would like to applaud all 27 members of the task force who spent hundreds of hours and traveled thousands of miles over these past five months meeting with parents, educators, business leaders, legislators, and other stakeholders including local school trustees and the president of the statewide parent-teach organization.

The task force members were very serious about their work and committed to hearing perspectives from throughout the state. I am proud of what we accomplished, and I look forward to having conversations with lawmakers as they consider the recommendations during the upcoming legislative session.

Idaho State Board of Education

State Board of Education research is aimed at helping more graduates follow through on college plans.

By Dane Higdem
Moreton & Company

RISK: MANAGE IT!

Risk Avoidance or Risk Reduction: What is the difference?

Risk avoidance and risk reduction are two ways to manage risk. Risk avoidance deals with eliminating any exposure to risk that poses a potential loss, while risk reduction deals with reducing the likelihood and/or severity of a loss. Therefore:

- Risk avoidance is not participating in any activity that carries risk
- Risk reduction is mitigating potential losses while engaging in activities or facilities that have risk

If one examines the two options it becomes apparent that we can't run our schools if we only participate in risk avoidance. In many ways we play with the cards we are dealt. For example, there are many school buildings within the state that were built before 1990. Why 1990? That was the year the American Disabilities Act (ADA) became law. Many of our districts need to practice risk reduction at those facilities, this could come as proactive maintenance of campuses to ensure we have plans for school security and in general planning how to do the best with what we have or can afford. If we were to practice risk avoidance, we just would not have any facilities that are older that 1990 and are compliant with ADA, not a practical or appealing strategy.

Who Manages Risk in Schools

Historically there may have been one or two people charged with this task, however, it is becoming more elusive and blurred as job functions and descriptions change seemingly daily to accommodate the doing-more-with-less funding attitudes within the state. The most obvious answers are the superintendent supported by building administration with support from the financial department and human resources.

The best answer is everyone. A team of people should always be responsible and accountable to specific risk management policies and procedures. This would include department heads for: food service, custodial, maintenance, operations, and instructional staff. They all need to be in the loop and should be managers of risk within their expertise. Risk management functions can be assumed by employees regardless of the size and needs of the school district.

Risk Comes in Unlimited Forms

It is easy to identify some physical risks such as the uneven sidewalks in and around the campus or the slippery floors by the doors during a rain or snow event. Others are not so easy to identify. It is important to classify your risks and document them, for example, in a risk register. The register allows for constant evaluation and tracking, hopefully to resolution.

Classifications of risk include but certainly are not limited to:

- financial/budgetary
- human resources
- property
- liability

This process for risk identification and classification needs to be well defined, rigorous, and continuously reviewed. For the non-risk manager types, this needs to be a deeply thought-provoking experience, as every single activity in a school district creates risk. A few examples: student and athlete/band transportation, foreign objects in served food, flash burns from welding, carpel tunnel from keyboarding, or a student struck by a car in the parking lot. There are many risks and many are not obvious. You get the idea. Bring these concerns to the district administration; it is their job to reduce risk. It seems there is a tendency to say, "no", however. There are sound financial and budgetary rational behind every decision to abstain from or delay risky activities. Before a risk is taken, it must be considered and possibly financed.

continued on next page...

Due Diligence:

There are two definitions of due diligence:

1. **Law:** the care that a reasonable person exercises to avoid harm to other persons or their property
2. **Business:** research and analysis of a company or organization done in preparation for a business transaction

What is due diligence and how does it apply to schools? There are topics that we need to ensure all district employees understand and have been demonstrably trained in. One such topic is bullying. This topic has been around and discussed for many years now. We should all know the requirements and what bullying is. So, if a situation or allegation arises, how do we know that our employees are trained and understand bullying? Even more importantly, are we able to unquestionably demonstrate that employees have been trained. That is the due diligence part.

Idaho law mandates that employees must be instructed on certain materials and, once trained, the material must be reviewed on a periodic reoccurring basis. Some of the mandated or recommended courses assigned to Idaho school district staff members include:

- **Bullying** – Recognition and Response
- **Students Experiencing Homelessness:** Awareness & Understanding
- **Youth Suicide Awareness, Prevention & Postvention**
- **Cyberbullying**
- **Boundary Invasion** (includes social media)
- **Sexual Harassment** - Staff to Staff
- **Sexual Misconduct** - Staff to Student

So how does a district demonstrate training and due diligence? Truthfully, there are many ways to do this. You could write training around each item, teach it, give a quiz, and collect and keep the materials for years in a closet. You could make and give training and track on a spreadsheet which needs to be kept up to date all the time, review it, and reassign to those topics that employees did not take as assigned. You could develop and manage some type of online system to do this and try and get people to take the training. BEST OF ALL, you could use a Learning Management System (LMS) which you can assign to employees that reports on the status of each employee and their assigned training at the touch of a button.

We have talked about SafeSchools in the past, but it is worth revisiting now in light of the due diligence topic we just finished.

SafeSchools is a tool which contains an LMS that you have access to by being a member of the ISBA Insurance Plan. There is a small cost of $1.75 per employee per year. This system can be of great benefit to your district to demonstrate and track compliance and due diligence. The SafeSchools compliance management system allows district administrators to quickly assign courses at a district, campus, or departmental level and track the completion of the course assignments down to the individual employee.

This is particularly important with the increase in school district exposures to wrongful act claims involving bullying, sexual harassment, and boundary invasion. Districts using SafeSchools can document that their employees completed training on these specific topics, demonstrating that the district has established a reasonable level of care to prevent these types of issues.

For those districts that have not recently visited their school district's SafeSchools website, or assigned new training topics to their staff, you really need to log on to your district's SafeSchools website to review their current course list and the enhancements made to their state-of-the-art compliance management system.

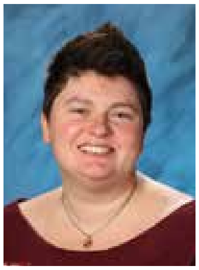
The best part of all is that with over 220 courses available, focused and designed specifically for public schools, ISBA Insurance Plan members have the opportunity to further improve upon the safety and loss control training available to their entire staff.

If you would like to learn more about **SafeSchools**, available Online Safety Training or other support for your school please contact:

- Allan Ranstrom
- Chad Ranstrom
- Aimee Assendrup or
- Dane Higdem

with **Moreton & Company** at (800) 341-6789

SafeSchools



By April Hoy
Research & Policy Coordinator

Statistic of the Quarter

More than ¾ of parents of elementary, middle/jr. high, and high school students

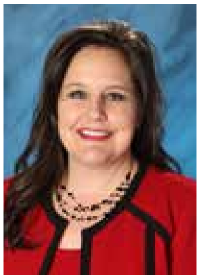
… surveyed in Idaho school districts with a 4 day week schools believe the 4 day week has a very or somewhat positive impact on their child's:

- Ability to learn the curriculum;
- Physical well-being;
- Ability to complete assigned homework; and
- School attendance.

Lewiston High School (in progress)

Amity Elementary School

Parma High School Vo-Ag Building



By Misty Swanson
ISBA Chief Deputy

Tips to Prevent Fraud in Your School District or Charter School: Part IV

In the Spring 2019 SLATE, I started the first of a series of articles offering tips to prevent financial fraud in your district or charter school office. This article series stems from the increasing number of fraudulent activities that have occurred in recent years, either intentionally or accidentally. This series of articles is meant to inform all readers of ways to help prevent financial fraud in your schools and offices.

Quick Tips from a School Auditor:

Who would know more about fraud prevention and detection than one of the most highly utilized CPA firms in Idaho? ISBA Business Partner, Quest CPAs provided these recommendations gained from working with over 60 Idaho school districts and charter schools each year.

- **Hire honest people.** With an honest person, you can run an entire organization with coin and currency and never have a penny come up missing. With a dishonest one, all the internal controls in the world will not prevent fraud (i.e. Enron, WorldCom).
- **Hire competent key finance personnel and pay them well.** Competent finance people understand double entry bookkeeping and this competence makes the school money through proper budgeting, charging of expenses to grants, and maximizing funding. It is common for a good finance person to pay for themselves several times over. Conversely, an incompetent finance person can cost a school plenty. Lastly, pay key finance people well, (provided they are competent – if so, they will pay for themselves). Paying them poorly will increase the likelihood of turnover, attract/retain less than the best finance people, and increase the incentive for fraud. It is not coincidence that the best run organizations have well paid CFOs.
- **Pay special attention to decentralized accounting systems.** Common decentralized accounting systems often exist out at the ASB school level (elementary, middle, high, etc.) and for the food service/child nutrition program. These accounts may have their own set of books, accounting systems, accounting personnel, and internal controls separate from the District and therefore may require additional considerations.
- **ASB accounts:** At a minimum, monthly ASB books, bank statements, and reconciliations

continued on next page...

should be reviewed and initialed by the respective principal each month for accuracy and completion. The principal should be looking at the deposits on the bank statements to ensure that the amount of money being deposited is reasonable for the events and programs that took place that month. Disbursements should also be reviewed (via check images, cancelled checks, etc.) to ensure they appear reasonable.

- **Food service / child nutrition.** If the District has a decentralized food service system, then it should go through the same monthly book, bank, and reconciliation review process described above for ASB accounts, except this review is typically performed either by the food service supervisor or by someone in the District office. In addition, there should be additional scrutiny over how well the food service program is running (i.e. profit, loss, or break-even). If the program is struggling financially, the reasons should be investigated. One key area to watch is inventory shortage. It is not uncommon for food service employees/supervisors to also have a catering business on the side. If this is the case, additional care needs to be taken to ensure all food service inventory is actually reaching and being consumed by the school.

For more information or if you'd like to visit with Quest CPAs about your district or charter school, financial and audit needs, please contact:

Kurt Folke, CPA
kurt@qcpas.com
208-642-1417

Dan Coleman, CPA
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tim@qcpas.com
208-642-1417

Quest CPAs, P.C.
Quality Expertise Service Timeliness

A School District's Tips:

Hardin County School District in Elizabethtown, Kentucky developed very thorough fraud prevention guidelines. With their permission, I am sharing a few of the guidelines from their website (www.hardin.kyschools.us.)

Discussion of three of the largest fraud cases over the past ten years in Kentucky schools:

Example 1 - School "D":

How it was discovered:

Anonymous letter mailed to Internal Audit & Superintendent with concerns of consultants being paid for work not being done at the school. Other concerns surfaced after the initial investigation including conflict of interest and fraudulent use of a school's credit card.

How it was perpetrated:

- Kickback scheme between Principal and "educational consultants."
- One or more of the consultants were friends or a relative.
- EC's got paid for services not rendered & split pay with Principal.
- Bookkeeper believed to have been hand-picked and worked in conjunction with the principal to deceive.
- Bookkeeper created online purchase orders for fictitious vendors and did receiving for false invoices.

How it could have been prevented:

- Check credentials of educational consultants.
- Criminal background checks of consultants.
- Fraud hotline or other reporting mechanism.
- Ensure credit card use is only for school's purposes.
- Do not allow vendors to pick-up checks from Accounts Payable.

Example 2 - School "S":

How it was discovered:

During the routine audit of the school's activity funds it was discovered that a number of checks were made payable to the bookkeeper totaling hundreds of dollars. After this initial finding it was necessary to aggressively pursue additional financial concerns at this school.

How it was perpetrated:

- Bookkeeper wrote and cashed checks payable to cash and bookkeeper with no backup available for review. She verbally claimed she was reimbursing student fees that were paid to the school.
- She stole cash from one deposit & made deposit whole by substituting checks from another deposit.
- She used checks out of order & not aligned with software, so bank statement couldn't be reconciled.
- Bookkeeper kept records so sloppy and in disarray that auditing became an adventure in itself.

continued on next page...

How it could have been prevented:

- Don't allow excessive disorganization!
- Mandate that teachers/sponsors receive and review monthly activity account statements.
- If refunds are allowed they should be made by check not cash and documentation signed by payee (similar to multiple receipt form).
- Staff told Auditor that bookkeeper was trying to obtain personal loans from coworkers; this is an indication that the bookkeeper was hurting financially. This should have been a warning sign!

Example 3 - School "L":

How it was discovered:

During the routine school activity audit it was discovered that a check, made payable to the bookkeeper, lacked supporting documentation and that the authoritative signature on the face of the check was not that of the principal. After this fraud was discovered, it was determined a more in-depth investigation was warranted, including reviewing previous years' records.

Other fraudulent discoveries included:

- Deception by fraud and forgery of School Activity and PTA documents.
- Checks written to the bookkeeper lacking sufficient supporting documentation.
- Use of school's Kroger charge card accounts for personal use.
- Use of a fictitious vendor.
- Theft of fund-raising proceeds and the creation of fraudulent invoices.
- The co-mingling of School Activity, PTA, and FRC funds allowing the school's bookkeeper to manipulate and falsify the financial records at her school for personal gain.
- Made payments to bookkeeper's Mortgage Company (KHC) and replaced the backup with fictitious documentation.

How it was perpetrated:

- The bookkeeper maintained the PTA records: she convinced the PTA president that she should maintain the PTA records allowing her to manipulate the funds. She never reconciled and no one ever saw the records. Donations to the school and the FRC were deposited into the PTA account then the bookkeeper wrote checks from PTA account to herself with no documentation.
- Ordered from Allegra Printing Company a set of duplicated checks to keep on file replacing fraudulent checks written to vendors and bookkeeper for cash. Duplicate checks on file in the school files had altered check numbers, forged signatures, and endorsements.
- Wrote checks payable to the bookkeeper out of the activity account and used forged and fictitious receipts as supporting documents.

continued on next page...

- Used Kroger charge card to purchase food and personal items.
- Bookkeeper created a fictitious vendor, Aurora!, wrote a check to this vendor, and deposited the check in her bank account endorsing it "Aurora" with her name signed below.
- Boldly stole fund-raising money generated from parking at special events. Bookkeeper had complete control over fund-raising activities.

How it could have been prevented:

- Principal should open bank statements and examine each cancelled check.
- Closely examine supporting documentations for all expenditures.
- Periodically visit bookkeeper's office with questions and general observations of records not necessarily available for review.
- Express a genuine interest in the overall duties and responsibilities of the bookkeeper.
- Observe and review receipting of funds run through the activity account. Understand, analyze, and scrutinize all financial statements within reason.
- Review check register and question payments to certain vendors, large dollar amounts, and checks made payable to bookkeeper.

I hope that the four SLATE issues on preventing fraudulent financial activity have given you new information and understanding of what proper accounting and reporting should entail. I encourage you to review the past SLATE issues as you recap this topic. Those prior issues can be found on ISBA's website here: https://www.idsba.org/blog/publications/slate-magazine/

By Quinn Perry
Policy &
Government Affairs
Director

Governing Through Policy: A Framework For Success

School policy is admittedly not everybody's favorite topic to discuss at school board meetings nor is it the most enjoyable task for your staff to maintain. School policy can be lengthy, dry, and if we are being honest, downright boring.

Despite all of these things, however, your policy manual is and should be one of your school or district's biggest priorities. Board policies are the guiding directions for operations within the school or district. Often, they act as tools to handle tricky situations or help protect the school or district from risks that may lead to litigation. Your policy manual also provides transparency to staff, students, and patrons on how the district or school operates and outlines the Board's standards of quality for learning and safety as well as the expectations and accountability to your community.

We know this task can feel enormous. Here are some of the best practices for making sure your policy manual is in tip-top shape.

1) Designate a Policy Workgroup (OR) Hold Regular Board Policy Work Session

We know that the superintendent or administrator often carries the burden of ensuring the policy manual is up-to-date and being followed properly. Whenever possible, we suggest the superintendent or administrator avoid being the sole "caretaker" of the policy manual by appointing a policy workgroup. Such a committee can collectively help with the review and upkeep of the policy manual and make sure that this monumental task does not fall on the shoulders of one person. Include one board member on this committee. At the end of the policy workgroup, the members of the group should create two to three bullet points outlining what changes are in the policy to be presented to the board. These bullet points can be simple, and summarize what (if any) provisions are being presented for removal. This helps the Board understand the changes and communicates the intent of the policy clearly before it's adopted. Like a work session, a policy workgroup should be posted as an open meeting for your patrons.

Since we know nothing in education is one-size-fits-all, it may make more sense for your board to hold a board work session that focuses specifically on policy before your regularly scheduled board meetings.

Identify appropriate individuals for a core policy committee, such as:

- **One Board Member**
- **Superintendent**
- **Building Principal**
- **A Lead Teacher**
- **Business Manager or Chief Financial Officer**
- **Appropriate individuals who will be affected directly by particular policies**

*** Remember, because this group will make a recommendation to the Board, it should be posted as an open meeting.**

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2) Review Policy at (nearly) Every Meeting.

While you may be reviewing and adopting changes to the policies that we have sent you a few times a year, you should also review a handful of policies at each meeting. This helps new board members understand and become familiar with your policy, and it ensures that you are following your policy. Your designated policy workgroup may conduct a deep dive review or the Board may do so at a work session, but it must be accepted as "reviewed" through a board action item.

Use a tracker that includes each policy so there is record of how long it's been since a particular section or policy has been reviewed. Perhaps the policies you review go in a particular order that a designee tracks throughout the year, or maybe you pick a few out of each section to review. ISBA began including a "Reviewed On" section at the bottom of our model policies so that you are aware of when each policy was last looked over by the Board. It is always advisable to include relevant policies in your board packet if a particular issue is before the board (for example, before undergoing your financial audit, review your financial audit policy).

While I am fully aware that it may be difficult to do a review at every meeting, especially if things that are more imperative must take place, the best way to keep your policy manual in good shape is regular review!

When Reviewing Policy, Ask Yourself:

- **Is the policy effective in achieving its intent?**
- **Is the District/School complying with the policy?**
- **Is the policy easy to understand?**

continued on next page...

ask ISBA

Question:

What is the suggested protocol on giving gifts to outgoing Board Members to thank them for their service?

Answer:

Under 33-507, Idaho Code, it is unlawful for a trustee to have a pecuniary interest – directly or indirectly – in any transaction pertaining to the maintenance of conduct of the school district or charter school. Thus, they may not accept any reward or compensation for services rendered as a trustee/board member.

That said, we know that it is important for us to honor the volunteers who dedicate countless hours to serve on their local school district or charter school board. Here are a few easy suggestions for avoiding any kind of ethical dilemma:

1. Avoid using district funds entirely and seek personal donations for the gift from fellow board members or willing members of your staff;

2. Consider asking the PTA/PTO group for help in soliciting donations for the gift;

3. Give your small gift to the trustee or board member after their official service is over. If the gift is given after the end of their service, it is less problematic to use school or district funds than it would be to do so while they are still a member of the Board.

IDAHO School Boards Association

3) Implementation is the Master Key to Success

Once a new policy or significant revision to a policy is adopted, don't overlook your process for implementation. While this is typically a function of the superintendent/administrator, here are some tips for your when a new policy or changes to a policy are ready to be implemented:

Communicate the key changes to the appropriate stakeholders, including any deletions from a policy. Update handbooks to comply with new or revised policies. Become familiar with the policy's process and put measures in place to stay up-to-date on its implementation. Draft district or school level procedures based on the Board's policy.

4) Look out for Red Flags

If you're adopting a new policy or significant changes to a policy (particularly if it's not being sent to you by a policy service, such as ISBA), here are some basic things to look out for:

- Board policies should not contain excessive or detailed procedures that are not required;
- Board policies should be adopted with stakeholder input, if applicable;
- Board policies should be adopted for long-term direction and mission, and not based on one situation;
- Board policies should reflect the objectives of the Board as a whole;
- Board policies should be reviewed by legal counsel. (FYI, any policy sent on behalf of ISBA's policy service has an undergone review by an attorney).

5) Make Your Policy Manual Accessible to the Public

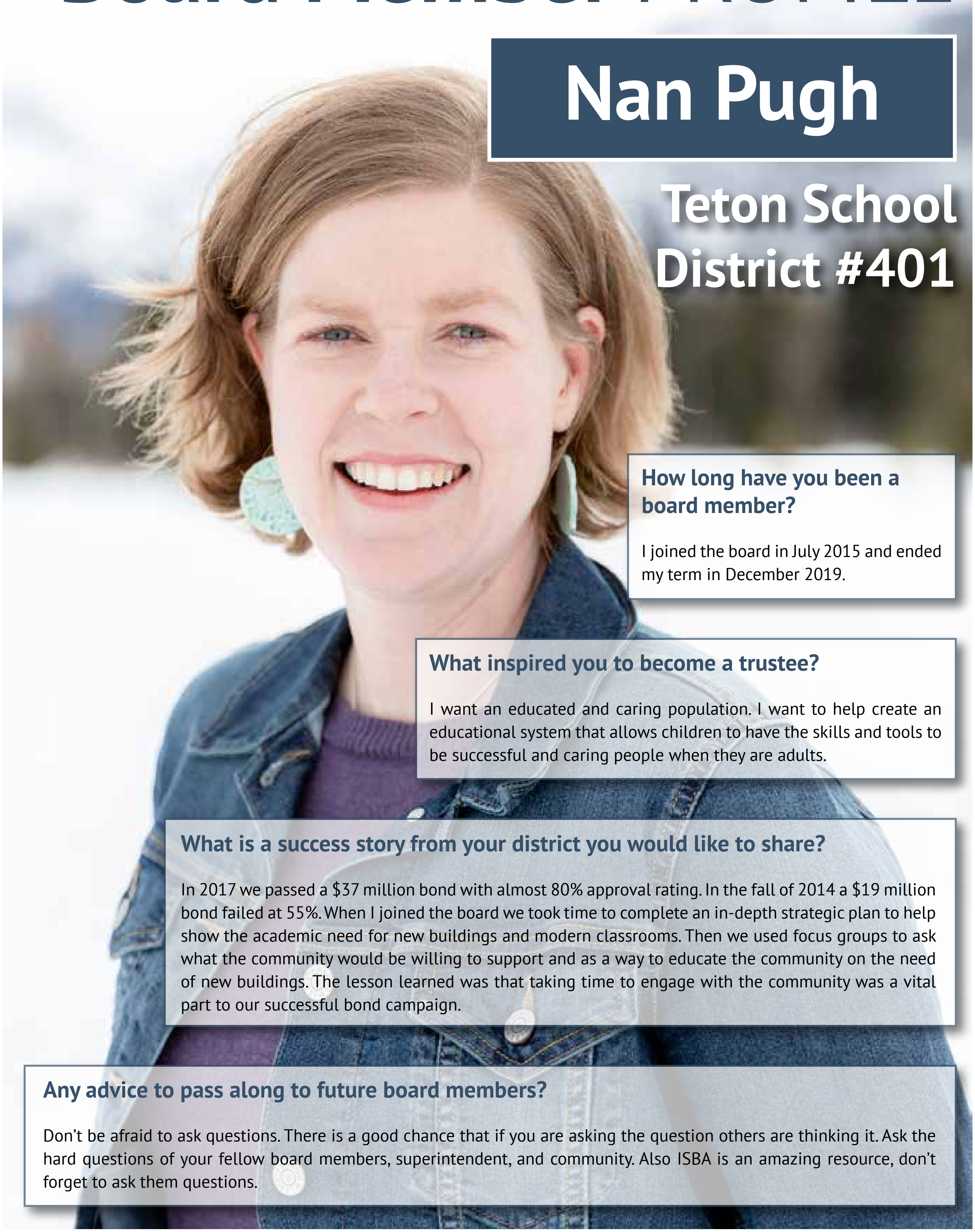
Most school districts and charter schools make their policy manual accessible to the public by posting it online. While it is not required to do so, it is a recommended practice and provides needed transparency to your staff, students, and patrons. Regardless, your school policies are a public record.

6) Never be Afraid to Ask

If you ever have questions about a policy, please never hesitate to call the ISBA office and ask for guidance. Lastly, subscribing to ISBA's policy services provides you an opportunity for us to create a model policy that meets unique or specific needs to your school districts or charter schools.

As always, we are here as a resource for you.

Board Member PROFILE



Nan Pugh

Teton School District #401

How long have you been a board member?

I joined the board in July 2015 and ended my term in December 2019.

What inspired you to become a trustee?

I want an educated and caring population. I want to help create an educational system that allows children to have the skills and tools to be successful and caring people when they are adults.

What is a success story from your district you would like to share?

In 2017 we passed a $37 million bond with almost 80% approval rating. In the fall of 2014 a $19 million bond failed at 55%. When I joined the board we took time to complete an in-depth strategic plan to help show the academic need for new buildings and modern classrooms. Then we used focus groups to ask what the community would be willing to support and as a way to educate the community on the need of new buildings. The lesson learned was that taking time to engage with the community was a vital part to our successful bond campaign.

Any advice to pass along to future board members?

Don't be afraid to ask questions. There is a good chance that if you are asking the question others are thinking it. Ask the hard questions of your fellow board members, superintendent, and community. Also ISBA is an amazing resource, don't forget to ask them questions.


A GREAT TIME IN
CDA
ISBA Annual Convention
2019
CHAMPION
ED

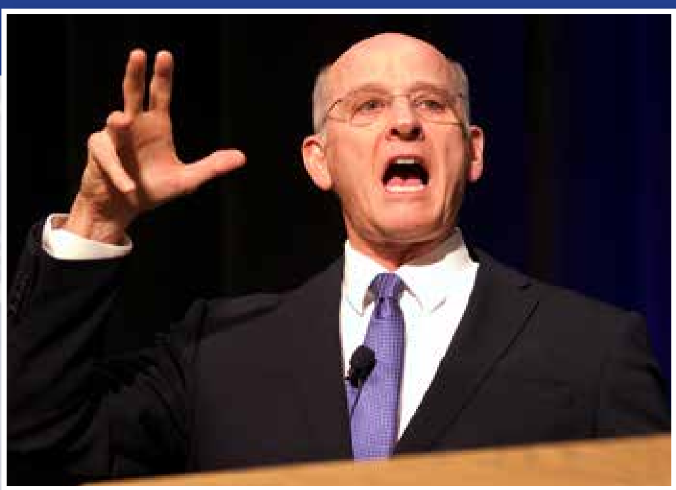
T H A N K Y O U

2019 ISBA Convention attendees plan their daily schedules.

ISBA Executive Director - Karen Echeverria

Attendees gather for breakfast and the First General Session.

The Scholarship Auction is always a good time had by all.



Keynote Speaker: Jamie Vollmer (Welcome to the Great Conversation)

Delicious food was provided during the Exhibit Show Luncheon.

Lake Coeur d'Alene Cruise Ships provided attendees with a new and unique workshop experience.

Workshop attendees enjoy the sunshine aboard the boat "Osprey".

Workshop: PERSI Executive Director - Don Drum

Workshop: West Ada SD Superintendent - Dr. Mary Ann Ranells

Workshop: Krissy LaMont & Amy White present on "How to Handle the Unexpected as a Board Member".

Marathon Man David Brinkman (ISBA Leadership Development Specialist) teaches one of his six workshops.

Exhibit Show: Allan & Chad Ranstrom - Moreton & Company

Exhibit Show: Harris CPAs

Workshop: Dr. Andy Grover and Jason Knopp present on "A Community Approach to School Facilities, Bonds, and Levies for Rural Districts".

2019 ISBA President - Jennifer Parkins

Speaker: Sherri Ybarra, Idaho Superintendent of Public Instruction

Speaker: Debbie Critchfield, President - State Board of Education


Scholarship Auction: Past ISBA Presidents
Anne Ritter, Dallas Clinger, and Auctioneer - Alden Neal


Awards Banquet: Board Chair of the Year - Bernie Jansen (Twin Falls SD)


Awards Banquet: Clerk of the Year - Michelle Lucas (Twin Falls SD)

Ken Hart from Nezperce SD testifies during Business Session.

ISBA Annual Convention • 2019 •

CHAMPION ED

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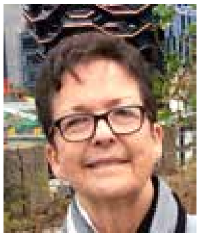

By Alice Arambarri
Moms Demand Action

Getting in Front of School Safety:

How Idaho Schools Can Help Prevent Gun Violence

For the last two decades our students, teachers, and parents have lived in the shadow of school shootings. Our nation's schools now have to contend with the reality of America's gun violence crisis, which encompasses mass shootings, homicides, assaults, unintentional discharges, and firearm suicides. When it comes to our kids, we will do whatever it takes to keep them safe. But in weighing proposals on how to address school safety, it is imperative that we prioritize solutions that protect our children from greater risk. That's why it's important to define this issue by the data –– not the headlines.

An Everytown for Gun Safety analysis of gunfire on school grounds revealed that 56 percent of shooters in these cases had a personal connection to the school. Among shooters under 18 years old, up to 80 percent obtained the gun from their home, a relative's home, or from a friend. The data also shows that in 93 percent of cases of targeted school violence incidents, there were behavioral warning signs that had caused others to be concerned, and in 81 percent of incidents, other people, most often the shooter's peers, had knowledge about the shooter's plans. This is worth reading twice.

From 2013 to 2018, Everytown identified 405 incidents of gunfire on school grounds. Of these, 260 occurred on the grounds of an elementary, middle, or high school, resulting in 109 deaths and 219 injuries. This is a devastating reality and more reason why we need meaningful action to keep our students, teachers, and schools safe. Thanks to decades of school safety research, we now have an opportunity to intervene before any violence happens. Fortunately for school boards, there are a number of evidence-based actions that can be taken at the local level by school boards to help prevent gun violence.

These actions include creating a climate where students feel supported and able to come forward with information about threats. This allows students to seek guidance if they witness or know of a student who happened to be in crisis, which can help reduce the potential for gun violence in schools. It's also been proven that students in crisis tend to show warning signs. For this reason, school boards can adopt threat assessment programs that give school officials a roadmap to navigate those signs, and most importantly, to figure out if a student showing warning signs has access to a firearm. These assessments have been proven to not only improve school climate but also address violence at the earliest stages. The Idaho Office of School Safety & Security and numerous districts are doing fantastic work on this front developing a Behavioral Threat Assessment Model and the "See Tell Now" hotline.

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Research also shows that the guns that are brought to schools are obtained from home, and school boards can play a crucial role engaging with parents about the importance of secure gun storage. There are a number of local initiatives and public awareness campaigns about secure firearm storage that school boards can turn to for support in this area, such as the Moms Demand Action-developed, PTA-endorsed, program Be SMART.

BE SMART

The Be SMART program provides tools and resources to raise awareness about gun safety and inspire conversations about responsible gun storage in our communities. The model is based on an acronym that lays out the simple steps parents and caretakers can take to keep kids safe: Secure all guns in homes and vehicles; Model responsible behavior; Ask about firearms in other homes your child visits; Recognize the role of guns in suicide; and Tell your peers to Be SMART. Everyone — gun owners and non-gun owners alike — can work together to prevent accidents and unfettered firearm access leading to senseless gun violence. School officials are essential partners in this mission.

Throughout the US, nearly 4.6 million American children live in homes with at least one gun that is loaded and unlocked. What's more, a study by Pediatrics & Adolescent Medicine shows that the majority of children are aware of where their parents store their guns, and more than one third reported handling their parents' guns –– many without the knowledge of their parents. In fact, the same study recorded that nearly a quarter of parents did not know that their children had handled the gun in their house. School boards can play a part in preventing gun violence in Idaho by sharing this information with parents and encouraging them to take simple steps to securely store firearms in their homes in order to keep our children and our schools safe.

When the Idaho legislature gavels in this legislative session, lawmakers owe it to Idahoans to advocate for common-sense laws that work to keep our communities safe. In the meantime, Idaho schools can stand up for our children and get ahead on school safety to intervene before devastating tragedies strike our communities. School board trustees are elected with the authority to create and enforce policies that can help reduce gun violence. By adopting a comprehensive set of proven and effective solutions on school and student safety - such as establishing safe and equitable school policies and programs, encouraging a culture of responsible gun ownership, and informing parents about secure storage — we can create safe environments for students to thrive. Our teachers and kids deserve it.

Alice Arambarri is a volunteer with Moms Demand Action, a gun owner, and a lifelong Idahoan. She is the proud mother of an Idaho public school teacher, the proud grandmother of three Idaho public school students, and feels very fortunate to have raised her family in this state. Arambarri is also a gun violence survivor.

By Shannon Decker, M.Ed.
The Speedy Foundation

They've Sent An Invitation, Now What?

The Basics - Suicide Intervention

If you are like me, you have probably stared into the eyes of a friend, loved one, colleague, or even a student when they are in the worst moments of their life. They might be disclosing verbal or nonverbal clues as to how they are feeling. Each of these is an invitation for you to reach out and help them; talk to them; ask them one specific question. There are common warning signs and risk factors that are indicative of an individual who has reached a point where suicide might be an option they are contemplating as a solution to the unsolvable problem they feel they are facing.

How Did They Get There?

Dr. Thomas Joiner proposes a theory, The Interpersonal-Psychological Theory of Suicidal Behavior (www.apa.org/science/about/psa/2009/06/sci-brief) which, in summary, states that a person will not die by suicide unless they have the desire and ability to do so.

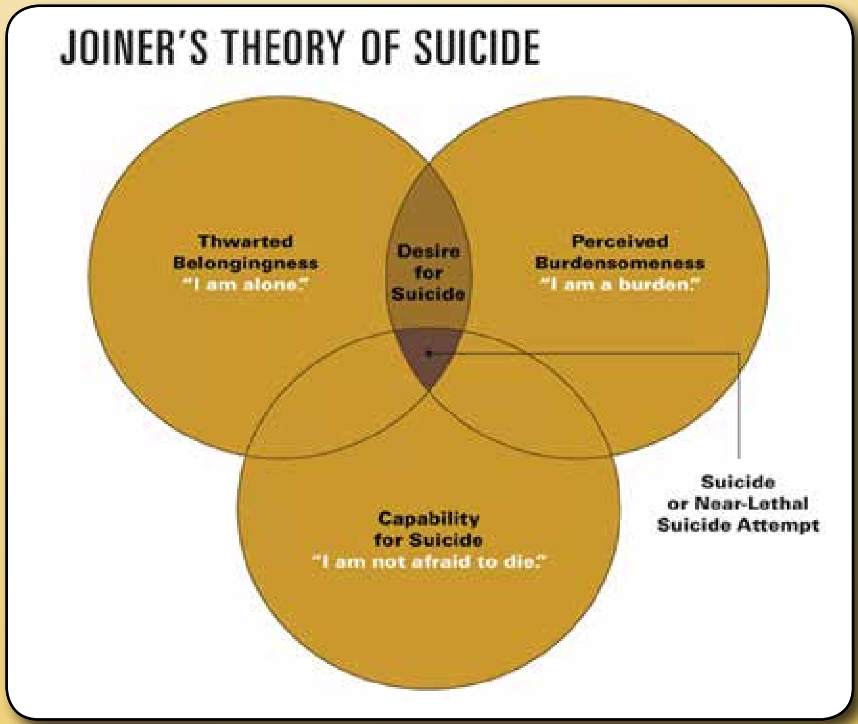

Photo: Newsweek, "Why Suicide Has Become an Epidemic--and What We Can Do to Help" (https://www.newsweek.com/2013/05/22/why-suicide-has-become-epidemic-and-what-we-can-do-help-237434.html)

Suicide Warning Signs

Something to look out for when concerned that a person may be suicidal is a change in behavior or the presence of entirely new behaviors. This is of sharpest concern if the new or changed behavior is related to a painful event, loss, or change. Most people who take their lives exhibit one or more warning signs, either through what they say or what they do.

Photo: AFSP Risk Factors and Warning Signs (www.afsp.org/about-suicide/risk-factors-and-warning-signs)

Suicide Warning Signs

Talk

If a person talks about:

- Killing themselves
- Feeling hopeless
- Having no reason to live
- Being a burden to others
- Feeling trapped
- Unbearable pain

Behavior

Behaviors that may signal increased risk; especially if related to a painful event, loss or change:

- Increased use of alcohol or drugs
- Looking for a way to end their lives, such as searching online for methods
- Withdrawing from activities
- Isolating from family and friends
- Sleeping too much or too little
- Visiting or calling people to say goodbye
- Giving away prized possessions
- Aggression or Fatigue

Mood

People who are considering suicide often display one or more of the following moods:

- Depression
- Anxiety
- Loss of interest
- Irritability
- Humiliation/Shame
- Agitation/Anger
- Relief/Sudden Improvement

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Photo: AFSP Risk Factors and Warning Signs (www.afsp.org/about-suicide/risk-factors-and-warning-signs)

Suicide Risk Factors

Health Factors

- Mental health conditions
    - Depression
    - Bipolar disorder
    - Schizophrenia
    - Conduct disorder
    - Anxiety disorders
- Substance use problems
- Personality traits of aggression, mood changes and history of poor relationships
- Serious physical health conditions, including pain
- Traumatic brain injuries

Environmental Factors

- Access to lethal means including firearms and drugs
- Prolonged stress such as harassment, bullying, relationship problems and/or unemployment
- Stressful life events such as rejection, divorce, financial crisis, other life transitions and/or loss
- Exposure to another person's suicide, or to graphic or sensationalized accounts of suicide

Historical Factors

- Previous attempts at suicide
- Family history of suicide
- Childhood abuse, neglect, or trauma

Suicide is Preventable.

"Friends don't let friends drive drunk." This campaign was a gamechanger with US rates of drunk driving. It empowered us "lay-folk" to address what could be an uncomfortable topic: starting a conversation and action that helped to keep others alive and safe. We did not need to wait for law enforcement to intervene. We could lean in as a upstander, no matter what role we lead in life.

We must have this same response to suicide! If we continue to expect those experiencing thoughts of suicide to reach out for help, then they will continue to die. It is the bystander who has the most power to stand up and help. This is all about building relationships and connections.

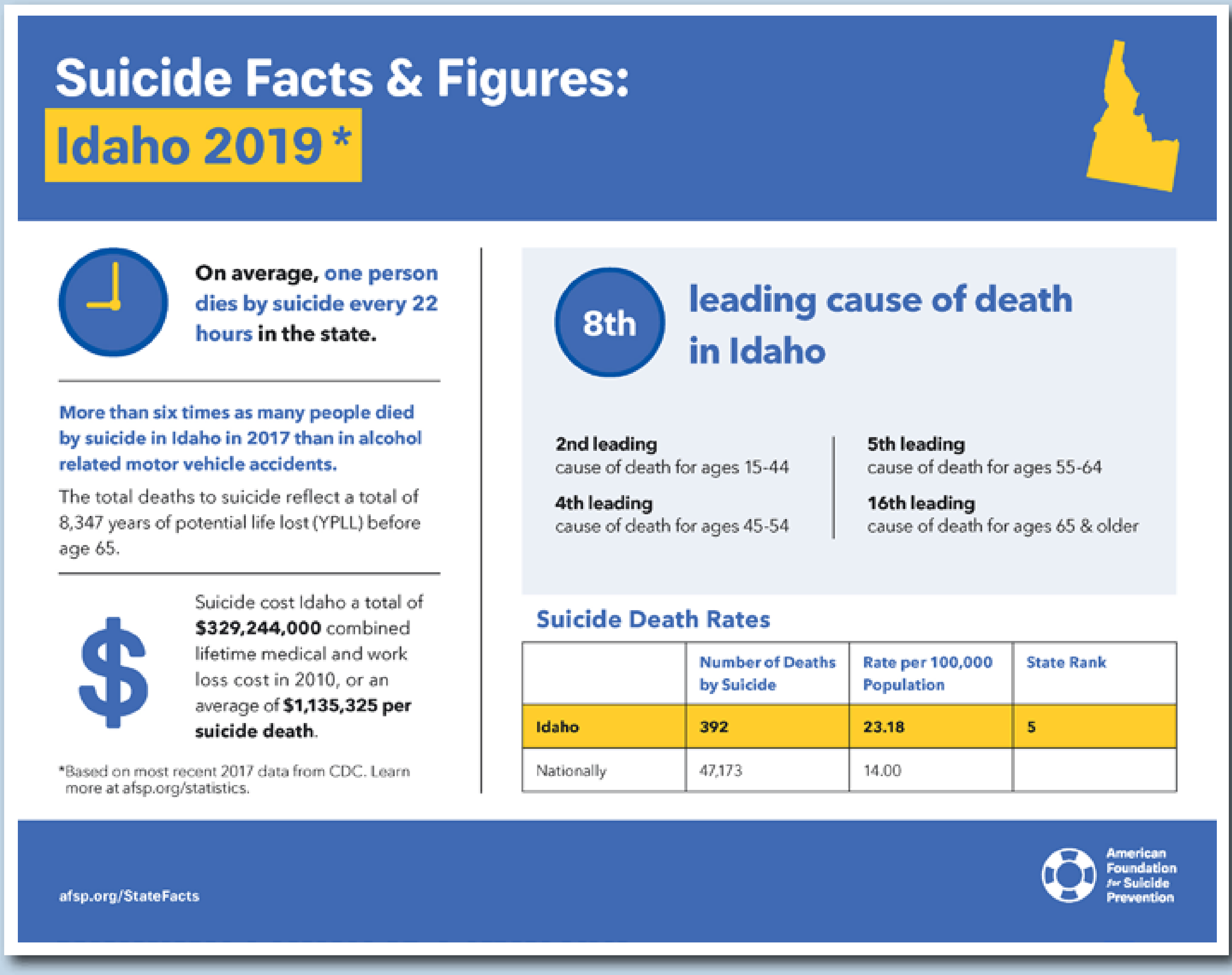
Ask Directly

As a society, we need to give ourselves permission to do the one thing that will help a person contemplating suicide the most. Ask direct questions such as: are you having thoughts of suicide or are you thinking about ending your life?" We do not need to be talking around in circles in the hopes that someone is reading between the lines. Suicide is a matter of life and death.

Talking indirectly about mental and emotional pain is one of the biggest problems that we have in society. There is a myth that if we say the "s-word," we will plant the idea as a seed. In all actuality, just the opposite is true. We have all contemplated our own mortality. By asking the question, it will not give someone the idea, but it will lessen the pressure they are feeling and give them the best opportunity that they will have to share the pain and hopelessness that they are feeling.

A Look at the Numbers – Where Are We?

For those who are interested in data driven decisions, take a look at www.idahope.org for links to the various data sources.



Suicide Facts & Figures:
Idaho 2019 *

On average, one person dies by suicide every 22 hours in the state.

More than six times as many people died by suicide in Idaho in 2017 than in alcohol related motor vehicle accidents.

The total deaths to suicide reflect a total of 8,347 years of potential life lost (YPLL) before age 65.

Suicide cost Idaho a total of **$329,244,000** combined lifetime medical and work loss cost in 2010, or an average of **$1,135,325 per suicide death**.

*Based on most recent 2017 data from CDC. Learn more at afsp.org/statistics.

8th leading cause of death in Idaho

2nd leading cause of death for ages 15-44

4th leading cause of death for ages 45-54

5th leading cause of death for ages 55-64

16th leading cause of death for ages 65 & older

Suicide Death Rates

	Number of Deaths by Suicide	Rate per 100,000 Population	State Rank
Idaho	392	23.18	5
Nationally	47,173	14.00	

afsp.org/StateFacts

American Foundation for Suicide Prevention

Photo: AFSP (www.afsp.org/statefacts)

continued on next page...

Crisis Resources –

In an emergency, call 911 and ask for a CIT (Crisis Intervention Team) Officer to respond, if possible. Additional resources can be found at www.Idahope.org.

- **The Hotline** – If you or someone you know is in crisis, call the National Suicide Prevention Lifeline at 1-800-273-TALK (8255) or text HELLO to 741-741; the Crisis Text Line. If you have an Idaho area code, the 1-800 will route you to the Idaho Hotline. You can also text Idaho's Suicide Prevention Hotline from 3 pm -12 pm Monday – Friday at 1-208-398-4357 or chat with them at www.idahosuicide-prevention.org. This resource is not just for those experiencing a suicidal crisis. If you are concerned about someone or are just curious about what would take place if a crisis were to occur, give the Hotline a call.
- **My3App** – Safety Planning – www.my3app.org
- **A Friend Asks App** – www.jasonfoundation.com (search "a friend asks")
- **Mobile Crisis / CIT Officers** – Mobile crisis teams are available in several Idaho counties. Many counties also have Crisis Intervention Team trained officers available to respond in a crisis.
- **Idaho's Crisis Centers** – Each region of our state has a crisis center that is free and open to anyone age 18 and older. Idaho Crisis Centers can be found at www.livebetteridaho.org/top-level-services/behavioral-health

Treatment for Suicidality

If you have read up until now and feel that you are struggling yourself, you are half way there. There is help. There is hope. You can be helped, and you deserve to feel relief. Please reach out or confide your suicidal feelings to a trusted friend, and ask them to help you connect with help. You are neither alone nor a burden, no matter what your head and heart are telling you.

Finding quality treatment can often feel like an additional barrier. If you are supporting someone as they connect to care, or if you are looking for yourself, consider these tools:

- **Treatment Locator** – www.findtreatment.gov
- **Psychology Today** - www.psychologytoday.com/us/therapists
- **Call the Idaho Care Line at 211**- Free or low-cost services or resources

Protocols to address suicidality have been developed. As you are establishing care with a therapist, treat it like an interview. Search for a provider who has professional development in Collaborative Assessment and Management of Suicidality (CAMS) Care, Assessing and Managing Suicide Risk (AMSR), or general Zero Suicide training. Email Sharon Fritz (Sharon.Fritz@dhw.idaho.gov) for an updated list of providers who have been trained in Idaho.

continued on next page...

Take Action & Find More Information

Let's increase our mental health literacy one community at a time. Listen to a webinar, take a "Gatekeeper" and "CALM" training; start a conversation. The following organizations have resources:

- **The Speedy Foundation** – www.thespeeedyfoundation.org
- **American Foundation for Suicide Prevention** – www.afsp.org/chapter/afsp-idaho
- **Idaho Suicide Prevention Action Collective** – email Sharon Fritz (Sharon.Fritz@dhw.idaho.gov)
- **Idaho Suicide Prevention Hotline** - www.idahosuicideprevention.org
- **Idaho Suicide Prevention Program, Dept. of Health and Welfare** – www.healthandwelfare.idaho.gov (Search Suicide)
- **National Alliance on Mental Illness** – www.idahonami.org
- **Online Gatekeeper Training** – www.qprinstitute.com/individual-training
- **"CALM"** – Counseling on Access to Lethal Means - www.sprc.org/resources-programs/calm-counseling-access-lethal-means

My personal request is that if you ever get that gut feeling something is not right, when someone sends out an invitation for help, that you take the leap into what might be an uncomfortable conversation. I have missed this opportunity four times (that I know of) in my life. Three friends/loved ones are no longer here, and I pray that my sweet student is still with us as a thriving 10th grader this year.

Ask that person directly if they are having thoughts of suicide. Be prepared without any negative judgement or fear of what they might answer and be prepared to give them support, logistical help, and to keep them safe until the underlying crisis is resolved. Follow-up, be consistent, help them connect back with the things they loved at one point in life, and help them find new things to anchor them to life here in Idaho.

Stay tuned for additional information on suicide prevention and postvention next quarter.

***Shannon Decker**, is the Executive Director and co-founder of The Speedy Foundation, she holds a master's degree in educational leadership from the University of Idaho and has over ten years of private and public teaching and school administration experience in Idaho, Nevada, and California. She is a Mental Health First Aid, QPR (Question, Persuade, Refer,) safeTALK, Hope Squad, and Hope Conquers Aces facilitator who offers trainings in Idaho and Utah to further the foundation's mission of promoting mental health education and advocating for suicide prevention. Shannon consults with families to help them navigate the pathway to wellness with Pathfinder Therapeutic Consulting.*

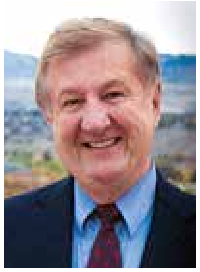
Learn more here: www.TheSpeedyFoundation.org/Educate, www.Idahoope.org, www.PathfinderTCS.com

We Love & Miss You Jess!

We were all devastated when we learned of the passing of our former Communication and Governmental Affairs Director, Jessica Gearino Harrison.

Jess worked for ISBA for seven years and she was a force to be reckoned with. Her wit was unmatched and her humor was spicy. Jess had a way of being energetic, brilliant, and at times, unshakably tough. She left the ISBA with a legacy of connectivity, as she worked to get all of Idaho's education stakeholders to work together in order to have better laws and rules for education in Idaho.

We were all aware that Jess was living with mental illness, and often found ourselves at a loss for what steps to take to get her the help she needed. This article is a reminder to all of us to check-in on our loved ones, colleagues, and friends, and to love one another unconditionally.



By Brian K. Julian
Anderson, Julian & Hull

Personal Liability Of School Board Members

A question is often asked as to personal liability of school board members in the state of Idaho in addition to the context of an Open Meeting violation. In the vast majority of circumstances, Board members are given ample protection for liability under the Idaho Tort Claims Act. Idaho Code 6-903 et seq. provides that an employee of a governmental entity shall be defended and indemnified so long as the employee's actions or inactions are within the course and scope of employment, and are performed without criminal intent or malice. While school board members are effectively unpaid volunteers, they are deemed employees under the Tort Claims Act. In particular, the Tort Claims Act provides as follows:

Idaho Code 6-902[4]:
"Employee" means an officer, board member, commissioner, executive, employee, or servant of a governmental entity, including elected or appointed officials, and persons acting on behalf of the governmental entity in any official capacity, temporarily or permanently in the service of the governmental entity, whether with or without compensation…

Thus, the fear of losing personal assets by serving on a school board is, thankfully, unfounded in most cases. The key to finding personal liability is found in the aforementioned provisions of the Idaho Tort Claims Act.

If one is acting outside the scope and authority of the governmental assignment, there is no protection, and personal assets are at risk. The classic case of acting beyond the course and scope of employment typically involves a criminal act or an intentional act inconsistent with the duties of the board. A claim of sexual abuse made by a student or an employee may trigger a denial of coverage. However, even something less severe can be found to be an act outside the course and scope of employment.

For example, in *Reiter v. (Unnamed Idaho School District)*, a jury found that board members acted individually and wrongfully in terminating the employment of a Superintendent. The evidence revealed that board members had sanctioned surveillance of actions of the Superintendent and had engaged employees to follow and chart his daily movements.

continued on next page...

Such involvement by the board certainly creates bias for any later employment action as the board had shared its duty in a quasi-judicial capacity with that of being an investigator and prosecutor. A board member cannot wear all three hats. In the above case, a jury ruled that board members acted outside the course of their responsibility as board members, and a judge ordered each board member to retrieve a financial statement and five years of income tax returns. Fortunately, the case was settled before the phase against individual board members was commenced.

The foregoing case serves as an example of a "worst case scenario." In most cases, a board member can be negligent or unreasonable, or even reckless, in pursuit of board duties without incurring personal liability.

In addition to acting outside the course and scope of duties, the Tort Claims Act provides that a malicious act will not be covered as an employee's protected act. In general, malice in law is the intent, without justification, excuse or reason, to commit a wrongful act that will result in harm to another. In other words, there must be a state of mind of knowing that the act is willful, and the results will be harmful to another individual or entity.

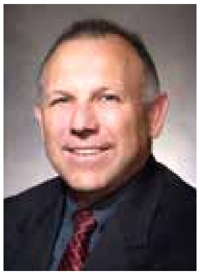
The Idaho Code, as well as each district's or charter schools' policy and procedure manual, creates distinct lanes of authority for board members, administrators, and educators. Liability attaches when those lanes have been crossed, or the boundaries of the lanes are blurred. There are many current examples of board members who have not "stayed in their lanes." For example, a board member recently attended a disciplinary interview between an administrator and an employee. The board thought that the employee needed support. Of course, the board member should now be recused from taking any action in the matter. Another example involves board members going to schools within the district and interviewing teachers regarding the effectiveness of certain administrators. Of course, this also creates bias and the board members should be recused. Board members should not be investigators. Another example is a board member who was dissatisfied with the operations of the business management department. The board member effectively took over the business management operation, while still acting as a board member. From a checks-and-balances perspective, the board member has crossed the line and may be creating individual liability by acting so far outside his designated role as a board member.

It is a predictable source of information to review personal liability decisions of non-profit boards. Non-profit board members join their boards, not unlike school board members, as they are passionate about the organization and its mission. Unfortunately, in certain instances, board members fail to ask the hard questions and fail to oversee the organization to meet their duty of care.

Recently, individual board members were each found personally liable for $2.25 million in damages for providing inadequate oversight, relying on incompetent officers and in failing to take adequate action once they knew there were problems. Astonishingly, no director, personally or individually, engaged in bad behavior other than being grossly inattentive in oversight of the organization. The non-profit organization was the Lemington Home for the Aged in Pittsburgh, Pennsylvania, and is a leading case on potential board liability for not controlling the financial well-being of a non-profit corporation. While the foregoing case is certainly alarming, it does sound a warning bell for boards who do not take appropriate action to supervise and control the financial well-being of a school district.

In sum, personal liability is extremely rare for school board members in the state of Idaho. Only in the case of acts outside the course and scope of the duties of the board, and acts which are deemed criminal or malicious will liability attach. However, in other states, liability has been found upon non-profit board members for simply ignoring obvious problems in management.

Brian K. Julian



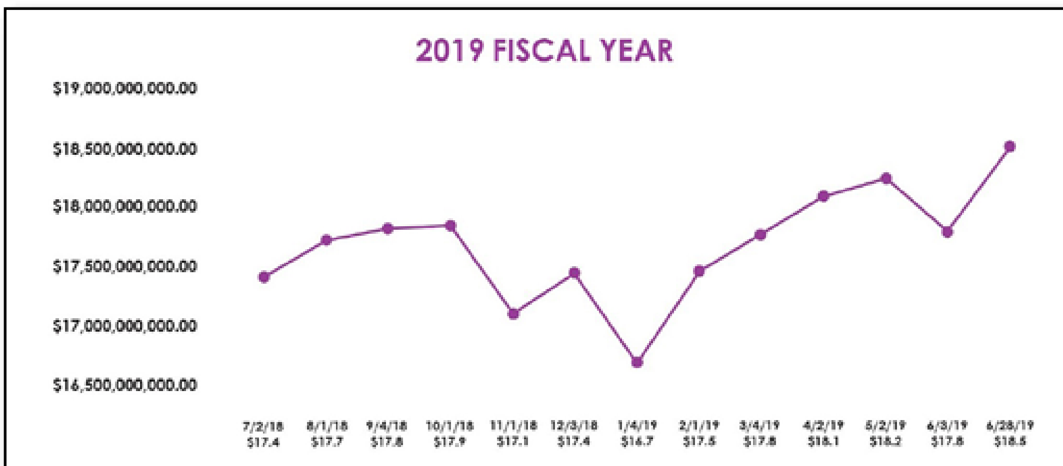
By Don Drum
PERSI Executive Director

Fiscal Year 2019 Highlights & Looking Forward

Fiscal year 2019 was a good year for PERSI even with significant market volatility. We finished the year with an asset value increase of over $1 billion and an estimated return of 8.4%. See image one.

While the markets continue to be unpredictable, PERSI relies on the same proven investment philosophy for over 25 years. PERSI keeps investments:

- **SIMPLE** – Rely primarily on public markets over time.
- **TRANSPARENT** – Easy to understand and explain.
- **FOCUSED** – Keep eye on the big picture.
- **PATIENT** – At least five to ten year horizon.



Some argue, with the recent market volatility, that pension systems must reform and change. While the markets are more volatile day to day or week to week, over longer periods of time the markets tend to balance out. Market volatility can influence some decisions that are time sensitive; however, our investment professionals have not seen the need to change our long-term investment strategy or asset allocation.

In addition, the Board remains vigilant of the Investment Return assumption and our investment strategy. At every monthly Board meeting, the Board and our investment professionals discuss market trends and outlooks. The Board periodically discusses a broad range of factors that could affect the Plan's funded status.

HIGHLIGHTS

During fiscal year 2019, the number of active PERSI members increased from 71,112 to 72,502. PERSI's retired members or annuitants receiving monthly allowances increased from 46,907 to 48,120. The number of inactive members who have not been paid a separation benefit increased from 37,588 to 39,867. Of these inactive members, 13,536 have achieved vested eligibility. Total membership in PERSI increased from 155,607 to 160,489 during the fiscal year. PERSI now has 808 public employers in the state who are members.

At the end of the fiscal year (2019), PERSI had an amortization period of 10.6 years and a funding ratio of 92.5 % (before COLA decision) of the present

continued on next page...

value of the projected benefits earned by employees. There are no proposed contribution rate increases on the table for employers or employees. PERSI's Executive Finance Officer, Alex Simpson, announced at November's Board meeting that members will earn a regular interest rate of 7.22% on their personal Base Plan accounts from January 1, 2020, through December 31, 2020.

PERSI MATTERS

This past summer we traveled the state meeting with school district administrators discussing the importance of documenting Return to Work for Certified Instructional Staff or Pupil Service Staff correctly.

In 2007, the legislature passed legislation to allow Certified School Teachers and School Administrators who have achieved service retirement and are at least 62 years of age to retire and return to work. The employer must comply with IRS regulations and state law. The IRS requires a clear and distinct termination and no promise of reemployment prior to the termination and that the member has received their first benefit payment.

Over time the State Board of Education made the decision to expand which positions are eligible for this benefit. Today approximately 10% of retiring teachers are retiring and returning to work. We learned that teachers were contacting our member's services office and implying that they might be receiving a promise of reemployment prior to a clear and distinct termination. Because of this, we made the decision to conduct statewide meetings with school district administrators to be certain they understand the state and IRS requirements. We made it clear that noncompliance could result in devastating consequences to the member, the employer, and potentially PERSI. These meetings were successful, and we believe state and IRS requirements are being met.

Because of return to work, we asked PERSI's actuaries to evaluate whether or not employer contributions on member wages for those who elect to return to work were covering the cost of the benefit. The data at this point appears to indicate that the retirement pattern has changed by approximately two years and the employer contribution falls short of covering the cost. Our actuarial analysis also indicates that educator normal cost has increased at a greater rate than other general members have.

We understand return to work cost is a part of this. However, we believe there may be other factors. Actuaries are carefully evaluating educator normal cost and the normal costs for general and public safety members. If we need to make contribution adjustments, it is best to present all needed adjustments based on a comprehensive assessment by our actuaries at the same time. We will work closely with actuaries and keep the Board and members updated on the assessment.

PERSI IN TOP TEN

PERSI remains one of the top ten state pension systems in the country. In a brief from The PEW Charitable Trusts, The State Pension Funding Gap: 2017, published June 2019, PERSI was highlighted as 1 of just 8 states that were at least 90% funded while 24 states were below 70% funded. See image two.

In August, Pensions & Investments magazine, U.S. Equities, Fixed Income Give Boost to Public Plans, listed PERSI as fifth in public plan returns for fiscal year 2019.

LOOKING FORWARD

At this past December (2019) Board meeting, the Board discussed the cost-of-living adjustment (COLA) for retirees. With the positive investment returns for this year, the Board chose to grant a discretionary COLA of 0.70% for FY2020. They also chose to make the historical decision granting retro COLAs from FY2011 (1.77%), FY2012 (0.69%), FY2013 (0.52%) and FY2018 (1.70%) in addition to the legislative mandated 1% COLA.

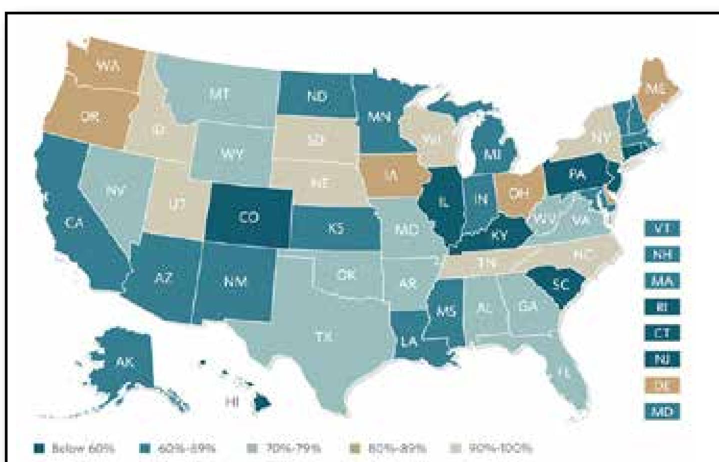
Providing the Legislature approves the discretionary and retro COLAs, the adjustments will go into effect on March 1, 2020.

NOT all retirees will receive a retro COLA. Adjustments vary based on the retiree's retirement date. Affected retirees will receive a Benefit Change notice informing them of the adjustment.

The Board takes their fiduciary responsibility very serious. They are carefully examining demographic challenges within the Fund and market volatility. Future actions concerning COLA will be challenging because of these factors. The Board's primary objective is to protect the integrity and stability of the Fund.

Overall, PERSI is doing well, but we must continue to be diligent to protect the wellbeing of the Fund and address challenges as they arise.

PERSI
Public Employee Retirement System of Idaho



Do you have a problem or issue at your school district that you want changed? Can this be changed by State Law or Administrative Rule?

If yes, prepare a Resolution to be submitted to ISBA. A Resolution is a document that explains the problem and what outcome you would like.

THE PROCESS OF RESOLUTIONS

from Start to Finish

How To Submit

- ✓ Send a copy to your Region Chair;
- ✓ Send a copy to the ISBA Office by fax to (208) 854-1480 or by mail to P.O. Box 9797, Boise, Idaho 83707-4797; and
- ✓ Email a copy to Quinn Perry at quinn@idsba.org

If you would like to receive a sample resolution, contact Quinn Perry by email at quinn@idsba.org or (208) 854-1476 or toll free (866) 799-ISBA (4722).

If you have any questions about the procedure for submitting or drafting resolutions, please contact Karen Echeverria, Executive Director: (208) 854-1476 or toll free (866) 799-ISBA (4722).

Some Resolutions are passed and some are not passed by the members. Those Resolutions that passed become the legislative platform for ISBA staff and lobbyists during the Legislative Session.

During the Legislative Session, ISBA staff request legislators to help "carry" the legislation (Resolutions) and present them

If the legislation (Resolution) passes the House and Senate then it goes to the Governor to be signed into law.

2020 Legislative Committee Assignments

Every other year, following an election, members of the Idaho Legislature convene in early December for their Organizational Sessions. The first order of business is the selection of leadership positions. Once the leadership positions in both chambers, and for both parties, have been established then committee assignments are determined. Committee Chairs are very important positions in Idaho. For those interested in education policy, it's crucial to know which legislators are in the majority leadership positions, the chairs of the education committees, and on the Joint Finance and Appropriations Committee (JFAC) which sets the public schools budget. Now is the time to start building relationships with these key individuals! You will also have a chance to meet with them during ISBA's Day on the Hill which is February 17-18 in Boise.

SENATE MAJORITY LEADERSHIP (R)
President Pro Tempore – Brent Hill (R)
Majority Leader – Chuck Winder (R)
Assistant Majority Leader – Steve Vick (R)
Majority Caucus Chair – Kelly Arthur Anthon (R)

Minority Leader – Michelle Stennett (D)
Assistant Minority Leader – Cherie Buckner Webb (D)
Minority Caucus Chair – Maryanne Jordan (D)

HOUSE MAJORITY LEADERSHIP (R)
Speaker of the House – Scott Bedke (R)
Majority Leader – Mike Moyle (R)
Assistant Majority Leader – Jason A.Monks (R)
Majority Caucus Chair – Megan Blanksma (R)

Minority Leader – Ilana Rubel (D)
Assistant Minority Leader – John McCrostie (D)
Minority Caucus Chair – Elaine Smith (D)

"Now is the time to start building relationships with these key individuals!"

Submit the Resolution to the ISBA Office no later than July 31st. If you would like help writing the Resolution or have questions, contact the ISBA Office.

Throughout the month of August, ISBA will review all Resolutions and may contact you for clarification.

All Resolutions are presented to the ISBA Executive Board during its September Board Meeting. There, the Board reviews all Resolutions and votes on each Resolution with a "do pass", "do not pass", or "no recommendation".

All Resolutions are sent to ISBA membership via email and posted on the ISBA website. Boards should review each of the Resolutions and discuss the pros and cons of the Resolutions. Boards should choose a position to take on each Resolution.

During the ISBA Annual Convention in November, the Business Session is held where member districts can debate and vote on each Resolution.

This is how your Resolution can ultimately become law and help your school district and many others in the State.

FINISH

Resolution Checklist

Include these elements:

- ✓ District / Charter name; ISBA Region number; mailing address; subject and presenter.
- ✓ At least one reasoning statement starting with "Whereas".
- ✓ A complete statement of purpose
- ✓ Conclude with a summarizing statement beginning with "Now, therefore be it resolved..."

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Chuck Winder (R)
Lori Den Hartog (R)
Carl Crabtree (R)
Jim Woodward (R)
Dave Lent (R)
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Janie Ward-Engelking (D)

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Judy Boyle (R)
Ron Mendive (R)
Gayann DeMordaunt (R)
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Jim Woodward (R)
Janie Ward-Engelking (D)
Mark Nye (D)

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Clark Kauffman (R)
Britt Raybould (R)
Scott A. Syme (R)
Caroline Nilsson Troy (R)
Melissa Wintrow (D)

Attend a Senate Education Meeting and a House Education Meeting at ISBA's Day on the Hill event. See the back cover for more information.

ISBA

STUDENT PHOTOGRAPHY

CONTEST

THEME: HOMETOWN IDAHO

SEND US ONE FAVORITE PHOTO FROM YOUR HOMETOWN

- Open to grades 6 - 12
- Entries must be received by 2/13/20
- Email photo to mika@idsba.org
- Include name, grade, school district, and where photo was taken
- Winners will be featured in ISBA's Spring SLATE Magazine

IDAHO ISBA School Boards Association

For more contest details, please visit: www.idsba.org/isba-student-photography-contest/

ISBA BUSINESS AFFILIATES

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/ Board Management Software

Charlie Rigby
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crigby@eboardsolutions.com
https://eboardsolutions.com

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/ Paperless Board Meetings

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hal.frazier@boardbook.org
www.boardbook.org

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/ Paperless Governance Solutions

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cdomby@boarddocs.com
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info@idsba.org

Arthur J. Gallagher / Gallagher Benefit Solutions
/ Postretirement Benefit Services

Christopher Diorio
(609) 452-2488
christopher_diorio@ajg.com
www.ajg.com

National Connection
/ Nationally Developed Tools for School Boards

ISBA
(208) 854-1476
info@idsba.org

I'm Safe Apps
/ Safety and Security

Briana McClain
(703) 349-1169
info@imsafeapps.com
www.imsafeapps.com

Axis Plus
/ Employee Flexible Spending

Paula Summers
(801) 878-0668
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Moreton & Company provides property and liability insurance as well as risk management services to members through the ISBA endorsed insurance plan. Moreton & Company also provides consulting service for employee benefits and self-funded workers compensation plans.

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allan@moreton.com
www.moreton.com

Chad Ranstrom
(208) 321-9300
cranstrom@moreton.com
www.moreton.com

Zions Public Finance, Inc.

Christian Anderson
(208) 501-7533
christian.anderson@zionsbancorp.com

Zions Public Finance is a leading municipal advisor to Idaho school districts. Having worked in Idaho since 1994, Zions has helped to finance hundreds of millions of dollars in bonds for both large and small districts throughout the state. Throughout the financing process, Zions maintains a fiduciary duty to its advisory clients, providing recommendations made in the best interests of each district.

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Quest CPAs is Idaho's largest school audit firm serving clients throughout the entire state. They specialize in providing timely, top quality audits by using experienced CPAs that are experts in school finance. If you are ready for change or would like a quote, check them out at www.qcpas.com.

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Founded in 1998 erstad ARCHITECTS brings over 75 years of combined, current architectural experience to our clients. We have designed, directed, and completed building projects of every size and variety, from historic renovations to urban office complexes; from multi-million-dollar student centers and mountain top ski lodges to YMCA full service camps. That said, our approach is one of familiarity, understanding, and experience working on learning facilities of all sizes. Our firm brings experience with the unique requirements of schools, a fresh perspective to the program, and a sustainable design philosophy that is unique and affordable.

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Established in Boise in 1896, Hummel Architects PLLC is a general practice architectural firm whose history touches nearly every Idaho community. Over the decades Hummel has built a solid reputation on the design of educational, institutional, civic, industrial, governmental, retail, office, and corporate structures.

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mboam@hummelarch.com
www.hummelarch.com

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Eric.Heringer@psc.com
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Michael Keith
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Michael.Keith@psc.com
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Piper Sandler is a broker-dealer with a Boise office that specializes in Idaho school bonds. Piper Sandler's Idaho based bankers have completed over 80 financings totaling $1.35 billion for Idaho school districts in the past 10 years. Piper Sandler offers financial expertise and transactional experience, as well as client services with tailored solutions.

CORE Construction

At CORE Construction, our foundation is built on trust. Every project begins with team members who have unwavering trust in one another, allowing CORE to operate as a unified group. Together, every CORE team member works collaboratively to deliver construction services that meet the needs of our clients and the needs of the communities we are privileged to serve.

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Boise, ID 83702
www.coreconstruction.com

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Based in Boise, Idaho, Pivot North Architecture specializes in K-12 education master planning, bond support, existing facility assessment, new projects, and future learning models. Their dedicated and talented staff has experience at the elementary, middle, and high school level. They have a passion for making their clients successful and strive to find creative solutions to any challenge. Call them today to see how they can help!

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Harris' dedicated team of government-focused CPAs brings expertise based on years of experience serving the education industry. We provide financial and compliance audit services and a full range of reporting and advisory assistance to schools throughout Idaho.

Josh Tyree
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joshtyree@harriscpas.com
www.harriscpas.com

THE LAST WORD

By Karen Echeverria
ISBA Executive Director

- WELCOME NEW

As we begin this new year, we also welcome several new Board members to our ranks. This is the first time that elections were held in November for traditional school board members, and we have been anxious to look at the results.

November Election Results

Terms expired for 274 board seats. Of those 274 seats, there were only 62 contested races. There was only one candidate or no candidate in the remaining 212 seats. Of the 62 races, 43 of those had an incumbent and at least one challenger. Of those 43, 23 incumbents (about half) lost their races.

When the elections were moved to November, there were two main goals. One of them was to have a larger voter turnout. That did occur because city elections are held at the same time. The other goal was to increase the number of individuals who might be interested in running for seat. Based on the results, I don't believe that occurred.

Board Members Taking Office Mid-Year

Because of the new November elections, this will be the first time that traditional Board members will take office during the middle of the school year. While the November election didn't seem to have much of an impact on the elections themselves, we don't yet know the impact on the work of the Board.

By the time you receive your first issue of the SLATE magazine, traditional Board members will have been sworn in and likely had their first meeting. During that meeting you likely elected your Chair and Vice Chair and appointed your Secretary/Treasurer. These three individuals will lead your Board during the upcoming year.

continued on next page...

The last word

BOARD MEMBERS -

One of the first lessons we teach new Board members is that you cannot act alone. Your only authority rests with the Board as a whole. You can certainly have a differing opinion and even vote no if that is your perspective. But, once the vote has been taken and the decision made, it is a decision of the Board.

The second lesson we teach is to always follow the chain of command. As a new Board member you will likely have patrons reaching out to you for answers to questions, to complain, and to ask for changes. You will want to help your patrons. However, back to lesson #1; you alone can't fix anything alone. You will need tell you patrons to go back to the teacher or principal to try to solve the problem. You should notify the superintendent about the call so they can be prepared if the issue elevates to their office.

There will be a myriad of new acronyms you've never heard before, a budget that was approved six months ago and you will be asked to understand as much as you can about it, contracts to approve, and bills to pay. Unfortunately, you may also need to deal with student and employee issues.

ISBA Is Here To Help You

We offer a ton of services to assist you – professional development, legal services, policy services, superintendent searches, and working with the legislature to support the legislative platform established by the membership – just to name a few. We are also here to answer any question you have.

Like with any new job you take on, things may seem completely overwhelming. I just want you to know that we are here to help you in any way we can. We are YOUR association. That is why we exist.

We appreciate all of our Board members – those who have served for many years and those who have served for just a few days. I look forward to meeting our new members.

As always, please feel free to call.

Karen Echeverria

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SAVE THE DATE

FEB 17-18 2020

MONDAY, FEBRUARY 17, 2020

- **9:00 AM** • **Workshop:** Let There Be Light
- **1:30 PM** • **Keynote:** Red Sky Public Relations
- **3:00 PM** • Senate Education Committee Meeting

TUESDAY, FEBRUARY 18, 2020

- **7:00 AM** • Buffet Breakfast
- **9:00 AM** • House Education Committee Meeting
- **10:30 AM** • **Presentation:** Legislative Advocacy 101
- **12:00 PM** • Legislative Luncheon
- **1:30 PM** • **Workshop:** Sustainable Safety Plans *
  • **Workshop:** Fiduciary Responsibility and Governing Boards *

* *$75 workshop fee, qualifies for State reimbursement*

ACCOMMODATIONS

Grove Hotel: $129 room rate
Phone Reservations: (888) 961-5000, ask for the ISBA Day on the Hill room block.

REGISTRATION

Save by registering early!
$130 Regular Registration • Before Feb. 1
$180 Late & On-Site Registration • After Feb. 1

FOR MORE INFO

Web: www.idsba.org/DayOnTheHill
Phone: (208) 854-1476 • **Toll-Free:** (866) 799-ISBA
Email: morgan@idsba.org
Check ISBA website for up-to-date details.

Meet with State Legislators to discuss legislative issues impacting your district or charter school.