

**STATE OF IOWA
BOARD OF EDUCATIONAL EXAMINERS**

Grimes State Office Building, Room B100
400 E. 14th Street
Des Moines, IA

2023-2024 BoEE Goals

- Goal 1: Explore options for conditional licensure for non-prepared individuals enrolled in preparation programs.
- Goal 2: Expand remediation trainings available for ethical violations.
- Goal 3: Expansion of ethics and grooming presentations to LEA's.

**BOARD MEETING AGENDA
Friday, March 22, 2024**

TIMES ARE APPROXIMATE

8:30 a.m.

Call Meeting to Order

Approve the Agenda

TAB A

Approve the Consent Agenda

- a. Minutes for February 23, 2024 board meeting

TAB B

**Professional Practices - Licensee Discipline - Closed Session -
Board Members Only (roll call)**

Open Session

- a. Results of closed session announced
- b. Approve closed session minutes for February 23, 2024
- c. Reinstatement(s)
 - 1. 22-112 Holly Hoelting
 - 2. 23-19 Jayden Kies

Communication from the Public

Board Communications

- a. Board Member Reports
- b. Executive Director's Report
 - 1. Legislative Update
 - 2. Agency Update
 - 3. Licensure Update
 - 4. Financial Update
 - a. FY24 February 2024

TAB C

12:00 p.m.

Lunch for Board Members

12:30 p.m.

Rules [Iowa Administrative Code – Chapter 282 (272)]

- a. *Adopt*
 - 1. None

- b. *ARRC Review Pending*
 - 1. None

c. Notice

1. None

d. Items for Discussion

1. Amend IAC 282 Chapter 22- Authorizations

TAB D

Waivers

1. None

Reports/Approvals:

1. Board Meeting Calendar (FY 24 & Updated Draft of FY 25)

TAB E

1:30 p.m.

Adjournment

UPCOMING MEETINGS

Friday, April 19, 2024

Friday, May 17, 2024

Thursday and Friday June 20 – 21, 2024
Board Retreat and Meeting in Des Moines

1 Kristen Rickey moved, with a second by Eric St Clair that in **case number 23-134**, the
2 Board find probable cause to establish a violation the Code of Professional Conduct
3 and Ethics, 282 IAC rule 25.3(6)c & s, and order this case set for hearing. Roll call
4 vote: Behrens – yes; Bleam – yes; Eidahl – no; Janzen – yes; Rickey – yes; St Clair –
5 yes; Weldon – yes; Zylstra – no; Lock – yes; **MOTION CARRIED**

6
7 Kristen Rickey moved, with a second by Eric St Clair, that in **case number 23-135**,
8 the Board finds that the evidence gathered in the investigation, including witness
9 statements and the documentary evidence, does not substantiate the allegations in the
10 complaint, and that the Board therefore lacks probable cause to proceed with this
11 matter. **MOTION CARRIED UNANIMOUSLY**

12
13 Eric St Clair moved, with a second by Pam Bleam, that in **case number 23-140**, the
14 Board find probable cause to establish a violation of the Code of Professional Conduct
15 and Ethics, 282 IAC rules 25.3(4)b, and order this case set for hearing. Roll call vote:
16 Behrens – yes; Bleam – yes; Eidahl – recused; Janzen – yes; Rickey – yes; St Clair –
17 yes; Weldon – yes; Zylstra – yes; Lock – yes; **MOTION CARRIED**

18
19 Eric St Clair moved, with a second by Kristen Rickey, that in **case numbers 23-235**,
20 the Board find probable cause to establish a violation of the Code of Professional
21 Conduct and Ethics, 282 IAC rules 25.3(5)a(2) and order this case set for hearing.
22 **MOTION CARRIED UNANIMOUSLY**

23
24 Pam Bleam moved, with a second by Kristen Rickey, that in **case number 23-195**, the
25 Board find probable cause to establish a violation of the Code of Professional Conduct
26 and Ethics, 282 IAC rule 25.3(2) a & b, and order this case set for hearing. **MOTION**
27 **CARRIED UNANIMOUSLY**

28
29 Eric St Clair moved, with a second by Kristen Rickey, that in **case number 23-214**,
30 the Board find probable cause to establish a violation of the Code of Professional
31 Conduct and Ethics, 282 IAC rule 25.3(1)e(4), 25.3(6)c & d, 25.3(8)a & b, and order
32 this case set for hearing. **MOTION CARRIED UNANIMOUSLY**

1 Kristen Rickey moved, with a second by Pam Bleam, that in **case number 23-219**, the
2 Board find probable cause to establish a violation of the Code of Professional Conduct
3 and Ethics, 282 IAC rule 25.3(1)c, e(3) & e(4), and order this case set for hearing.

4 **MOTION CARRIED UNANIMOUSLY**

5
6 Pam Bleam moved, with a second by Kristen Rickey, that in **case number 23-215**, the
7 Board find probable cause to establish a violation of the Code of Professional Conduct
8 and Ethics, 282 IAC rule 25.3(1)e(4), and order this case set for hearing. **MOTION**

9 **CARRIED UNANIMOUSLY**

10
11 Kristen Rickey moved, with a second by Pam Bleam, that in **case number 24-07**, the
12 Board find probable cause to establish a violation of the Code of Professional Conduct
13 and Ethics, 282 IAC rule 25.3(5)a(2), and order this case set for hearing. **MOTION**

14 **CARRIED UNANIMOUSLY**

15
16 Kristi Traynor recused during the closed session discussion of case number 23-124.

17 Eric St Clair moved, with a second by Pam Bleam, that in **case number 23-124**, the
18 Board finds that the evidence gathered in the investigation, including witness
19 statements and the documentary evidence, does not substantiate the allegations in the
20 complaint, and that the Board therefore lacks probable cause to proceed with this
21 matter. **MOTION CARRIED UNANIMOUSLY**

22
23 Eric St Clair moved, with a second by Pam Bleam, that in **case number 23-130**, the
24 Board find probable cause to establish a violation of the Code of Professional Conduct
25 and Ethics, 282 IAC rule 25.3(1)c, d, e(3), (4) & (7), 25.3(6)c & d, and order this case
26 set for hearing. **MOTION CARRIED UNANIMOUSLY**

27
28 Pam Bleam moved, with a second by Kristen Rickey, that in **case number 23-163**, the
29 Board finds that the evidence gathered in the investigation, including witness
30 statements and the documentary evidence, does not substantiate the allegations in the
31 complaint, and that the Board therefore lacks probable cause to proceed with this
32 matter. **MOTION CARRIED UNANIMOUSLY**

1 Kristen Rickey moved, with a second by Eric St Clair, that in **case number 23-160**,
2 the Board finds that the evidence gathered in the investigation, including witness
3 statements and the documentary evidence, does not substantiate the allegations in the
4 complaint, and that the Board therefore lacks probable cause to proceed with this
5 matter. **MOTION CARRIED UNANIMOUSLY**

6
7 Kristen Rickey moved, with a second by Eric St Clair, that in **case number 23-159**,
8 the Board find that, although one or more of the allegations in the complaint may be
9 substantiated by the witnesses interviewed in the course of the investigation [and/or]
10 the documents gathered in the course of the investigation, and the allegations may
11 constitute a technical violation of the board's statute or administrative rules; the
12 evidence before the board indicates that the alleged violation is not of sufficient
13 magnitude to warrant a hearing, and adequate steps have been taken to remedy the
14 violation and to ensure that incidents of a similar nature do not occur in the future.
15 The Board will not pursue formal disciplinary action in this matter. **MOTION**
16 **CARRIED UNANIMOUSLY**

17
18 Eric St Clair moved, with a second by Kristen Rickey, that in **case number 23-126**,
19 the Board find probable cause to establish a violation of the Code of Professional
20 Conduct and Ethics, 282 IAC rule 25.3(1)e(4), 25.3(6)c & d, and order this case set for
21 hearing. **MOTION CARRIED UNANIMOUSLY**

22
23 Kristen Rickey moved, with a second by Pam Blead, that the Board combine **cases**
24 **23-147 and 23-185**, find probable cause to establish a violation of the Code of
25 Professional Conduct and Ethics, 282 IAC rule 25.3(1)e(4) and 25.3(6)c & d, and order
26 this case set for hearing. **MOTION CARRIED UNANIMOUSLY**

27
28 Pam Blead moved, with a second by Kristen Rickey, that in **case number 23-132** the
29 Board finds that the evidence gathered in the investigation, including witness
30 statements and the documentary evidence, does not substantiate the allegations in the
31 complaint, and that the Board therefore lacks probable cause to proceed with this
32 matter. **MOTION CARRIED UNANIMOUSLY**

1 Eric St Clair moved, with a second by Pam Blead, that in **case number 23-95**, the
2 Board find probable cause to establish a violation of the Code of Professional Conduct
3 and Ethics, 282 IAC rule 25.3(6)d, and order this case set for hearing. **MOTION**

4 **CARRIED UNANIMOUSLY**

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6 Eric St Clair moved, with a second by Pam Blead, that in **case number 23-96**, the
7 Board finds that the evidence gathered in the investigation, including witness
8 statements and the documentary evidence, does not substantiate the allegations in the
9 complaint, and that the Board therefore lacks probable cause to proceed with this

10 matter. **MOTION CARRIED UNANIMOUSLY**

11
12 Pam Blead moved, with a second by Kristen Rickey, that in **case number 23-112**, the
13 Board finds that the evidence gathered in the investigation, including witness
14 statements and the documentary evidence, does not substantiate the allegations in the
15 complaint, and that the Board therefore lacks probable cause to proceed with this

16 matter. **MOTION CARRIED UNANIMOUSLY**

17
18 Eric St Clair moved, with a second by Kristen Rickey, that the Board accept the
19 respondent's waiver of hearing and voluntary surrender in **case number 23-157** and
20 that the Board issue an order permanently revoking the license with no possibility of
21 reinstatement. **MOTION CARRIED UNANIMOUSLY**

22
23 Kristen Rickey moved, with a second by Eric St Clair, that the Board accept the
24 respondent's waiver of hearing and voluntary surrender in **case number 23-217**, and
25 that the Board issue an order permanently revoking the license with no possibility of
26 reinstatement. **MOTION CARRIED UNANIMOUSLY**

27
28 Pam Blead moved, with a second by Eric St Clair, that in **case number 23-144**, the
29 Board accept the agreement submitted by the parties, and issue an Order
30 incorporating the agreement and imposing the agreed upon sanction. **MOTION**

31 **CARRIED UNANIMOUSLY**

1 Eric St Clair moved, with a second by Kristen Rickey, that in **case number 23-12**, the
2 Board accept the agreement submitted by the parties, and issue an Order
3 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
4 **CARRIED UNANIMOUSLY**

5
6 Kristen Rickey moved, with a second by Pam Bleam, that in **case numbers 22-131**,
7 the Board accept the agreement submitted by the parties, and issue an Order
8 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
9 **CARRIED UNANIMOUSLY**

10
11 Pam Bleam moved, with a second by Eric St Clair, that in **case numbers 23-59**, the
12 Board accept the agreement submitted by the parties, and issue an Order
13 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
14 **CARRIED UNANIMOUSLY**

15
16 Eric St Clair moved, with a second by Kristen Rickey, that in **case number 23-99** the
17 Board accept the agreement submitted by the parties, and issue an Order
18 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
19 **CARRIED UNANIMOUSLY**

20
21 Kristen Rickey moved, with a second by Pam Bleam, that in **case number 23-98**, the
22 Board accept the agreement submitted by the parties, and issue an Order
23 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
24 **CARRIED UNANIMOUSLY**

25
26 Pam Bleam moved, with a second by Eric St Clair, that in **case number 23-161**, the
27 Board accept the agreement submitted by the parties, and issue an Order
28 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
29 **CARRIED UNANIMOUSLY**

30
31 Eric St Clair moved, with a second by Kristen Rickey, that in **case number 23-106**,
32 the Board accept the agreement submitted by the parties, and issue an Order

1 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
2 **CARRIED UNANIMOUSLY**

3

4 Kristen Rickey moved, with a second by Pam Bleam, that in **case number 23-93**, the
5 Board accept the agreement submitted by the parties, and issue an Order
6 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
7 **CARRIED UNANIMOUSLY**

8

9 Pam Bleam moved, with a second by Eric St Clair, that in **case number 23-54**, the
10 Board accept the agreement submitted by the parties, and issue an Order
11 incorporating the agreement and imposing the agreed upon sanction. **MOTION**
12 **CARRIED UNANIMOUSLY**

13

14 Kristen Rickey moved, with a second by Eric St Clair, to accept the signed consents to
15 waive the deadline in **case numbers 23-167 and 23-169**, and issue an order
16 extending the deadline. **MOTION CARRIED UNANIMOUSLY**

17

18 Eric St Clair moved, with a second by Pam Bleam to extend the 180-day deadline for
19 issuance of the final decision in **case number 23-162** based upon the amount of time
20 needed to complete the investigation and conclude the contested case process and
21 Respondent did not file an objection to the extension even though given an
22 opportunity to object. **MOTION CARRIED UNANIMOUSLY**

23

24 Pam Bleam moved, with a second by Kristen Rickey, to extend the 180-day deadline
25 for issuance of the final decision in **case number 23-164** based upon the amount of
26 time needed to complete the investigation and conclude the contested case process
27 and the Respondent does not object to the extension. **MOTION CARRIED**
28 **UNANIMOUSLY**

29

30 Kristen Rickey moved, with a second by Eric St Clair to extend the 180-day deadline
31 for issuance of the final decision in **case number 23-166** based upon the amount of
32 time needed to complete the investigation and conclude the contested case process

1 and Respondent did not file an objection to the extension even though given an
2 opportunity to object. **MOTION CARRIED UNANIMOUSLY**

3
4 Eric St Clair moved, with a second by Pam Bleam, to extend the 180-day deadline for
5 issuance of the final decision in **case number 23-168** based upon the amount of time
6 needed to complete the investigation and conclude the contested case process and
7 Respondent does not object to the extension. **MOTION CARRIED UNANIMOUSLY**

8
9 Kristi Traynor and Andrew Steffensmeier recused during the closed session
10 discussion of the following 180-day cases:

11
12 Pam Bleam moved, with a second by Kristen Rickey, to extend the 180-day
13 deadline for issuance of the final decision in **case number 23-165** based upon
14 the need to schedule the hearing and conclude the contested case process the
15 Respondent would not be prejudiced by the additional time necessary to
16 resolve the pending complaint given that investigative information remains
17 confidential pending the final decision. **MOTION CARRIED UNANIMOUSLY**

18
19 Kristen Rickey moved, with a second by Eric St Clair to extend the 180-day
20 deadline for issuance of the final decision in **case numbers 23-170 & 171**
21 based upon the need to schedule the hearing and conclude the contested case
22 process and allowing more time for resolution of the complaint assures due
23 process for the Respondent. **MOTION CARRIED UNANIMOUSLY**

24
25 Kristen Rickey moved, with a second by Eric St Clair to approve the closed
26 session minutes for January 11, 2024. **MOTION CARRIED UNANIMOUSLY**

27
28 Requests for Reinstatement:

29 **Case No. 19-77** In the Matter of Jane Kreifels. Ms. Kreifels was alleged to have
30 deliberately misrepresented progress data for a student. She received a sanction of: a
31 public reprimand, suspension of her special education endorsement for a minimum of
32 one year, and completion of a 15-hour Ethics for Educators training course. The

1 Board noted that the Respondent had met the timeline of the suspension and fulfilled
2 the requirements of her disciplinary order. Ms. Kreifels was not present before the
3 board. Kristen Rickey moved, with a second by Eric St Clair, that the board approve
4 reinstatement of the license in **case no. 19-77** because the need for the suspension no
5 longer exists and it is in the public interest to reinstate the license. **MOTION**
6 **CARRIED UNANIMOUSLY.**

7
8 **Case No. 23-50** In the Matter of Robert Rhum. Mr. Rhum was alleged to be in
9 possession of, consumed and was under the influence of alcohol while at the State
10 Wrestling Tournament and responsible for supervising the District's wrestlers. He
11 received a sanction of: written reprimand, deferred suspension for a minimum of three
12 months, a completion of a 15-hour Ethics for Educators training course and
13 completion of a substance abuse evaluation. Mr. Rhum was not present before the
14 board. The Board noted that Mr. Rhum has fulfilled the requirements of his
15 disciplinary order and the suspension period has fully elapsed. Pam Bleam moved,
16 with a second by Eric St Clair, that the board approve reinstatement of the license in
17 **case no. 23-50** because the need for the suspension no longer exists and it is in the
18 public interest to reinstate the license. **MOTION CARRIED UNANIMOUSLY.**

19
20 Petition for Waiver:

21 Kristen Rickey moved, with a second by Eric St Clair, that the Board approve **PFW 24-**
22 **01 Jo Ann Aukes. MOTION CARRIED UNANIMOUSLY.** Reasons for approving: On
23 February 6, 2024 the Board received a Petition from Ms. Aukes requesting a waiver of
24 the rule for the requirements to add an endorsement. Ms. Aukes holds a Master
25 Educator License with the following endorsements: Special Education Consultant, K-6
26 Teacher Elementary Classroom, K-8 Multicategory Special Class with Integration, K-8
27 Instructional Strategist I: Mild/Moderate. This license expires on June 30, 2026.
28 While a professor at Grand View University in Des Moines, the Department of
29 Education accredited the teacher preparation program. The accreditation team
30 reviewed her experience, transcripts, and doctorate degree and determined that she
31 was qualified to develop and teach the Strategist II coursework, however, she was
32 missing the required secondary experience. Ms. Aukes worked at a local high school
33 with level II and III special education students for more than twenty-four hours to

1 satisfy the Department of Education. In her current role as a Special Education
2 Consultant with the AEA, Ms. Aukes has many opportunities to work with students
3 and staff at Grandwood Education Center in Granger, a K-21 Special education
4 school. The Board determined that applicant had strong components for the
5 remainder of the requirements for the endorsement. The Board was unable to identify
6 any person whose rights would be prejudiced by granting this waiver. The rule from
7 which Ms. Aukes seeks a waiver is not specifically mandated by statute or any other
8 provision of law, and, accordingly, may be waived by the Board. Ms. Aukes has strong
9 components for the remainder of the requirements for the endorsement.

10
11 Eric St Clair moved, with a second by Kristen Rickey, that the board deny **PFW 24-02,**
12 **Tonya Moore Huss.** **MOTION CARRIED UNANIMOUSLY.** Reasons for denying: On
13 February 12, 2024, the Board received a Petition from Tonya Moore-Huss requesting a
14 waiver of the rule for the requirements to add a K-12 endorsement to teach students
15 with severe intellectual disabilities. Ms. Moore-Huss holds Master Educator License
16 with the following endorsements: K-6 Teacher Elementary Classroom, K-8 Mildly
17 Disabled, K-8 Behavioral Disorders. This license expires on June 30, 2025.
18 Ms. Moore-Huss was notified that she was not qualified to teach students with
19 Intellectual Disability (ID). Ms. Moore-Huss has taught for thirty-two years and has
20 had many experiences teaching students of all abilities. She has taught classes that
21 are on the list for this endorsement. The Board felt there is insufficient evidence that
22 the rule would impose an undue burden on the person who is requesting the waiver.
23 She qualifies for a conditional license. Ms. Moore-Huss has not shown that the
24 health, safety and public welfare would be protected by granting this waiver. The
25 Board also felt there are too many courses that would need to be waived by granting
26 this request and she is not currently qualified to teach these students. There was no
27 work verification provided. Ms. Moore-Huss could get the conditional license now and
28 later ask for a waiver of the part of the endorsement she had experience.

29
30 Eric St Clair moved, with a second by Kathy Behrens, to issue a temporary waiver of 2
31 years to allow Mr. Barnes time to meet the qualifications for **PFW 24-03, Caleb**
32 **Barnes.** A vote was taken: St Clair and Behrens voted – yes; Bleam, Eidahl, Janzen,
33 Rickey, Weldon, Zylstra and Lock voted – no. **MOTION FAILED.** Kristen Rickey

1 moved, with a second by Eric St Clair, to temporarily grant for three years **PFW 24-03,**
2 **Caleb Barnes.** The Petitioner must complete half of the requirements during those
3 three years and continue successfully teach in this field in some capacity. **MOTION**
4 **CARRIED UNANIMOUSLY.** Reasons for temporarily granting: On February 13, 2024
5 the Board received a Petition from Mr. Barnes requesting a waiver of experience
6 requirements to add 5-12 Marketing and 5-12 Accounting to his CTE Authorization.
7 Mr. Barnes holds a Coaching Authorization Initial Career and Technical Authorization
8 with the following endorsements: 5-12 Office Education. This license expires on
9 October 31, 2026. Mr. Barnes' CTE Authorization limits the course he can teach.
10 Instructional coaches and administration provide significant support for his teaching.
11 Mr. Barnes has work experience from recruiting for college football teams and colleges,
12 and working at Hy-Vee. The board found no undue hardship nor prejudices to others
13 for granting this waiver. The rule from which Caleb Barnes seeks a waiver is not
14 specifically mandated by statute or any other provision of law, and, accordingly, may
15 be waived by the Board. The Board felt Mr. Barnes has taken all opportunities for
16 coaching and teaching. He is getting significant assistance from the administration
17 and instructional strategists.

18
19 Communication from the Public:

20 None

21
22 Board Member Reports:

23 Chad Janzen stated appreciation for the work being done to draft a bill that defines
24 grooming. Kristen Rickey stated concern regarding the number of cases related to
25 grooming and would like to see it addressed in pre-service requirements for teachers.

26
27 Executive Director's Report

28 Legislative Report:

29 Rules discussed today encompasses all rule adoptions and changes needed per 2023
30 legislative action. Joanne Tubbs has made the bill tracker available to board members
31 and Director Cavin encouraged any questions that arise. Joanne has begun the initial
32 investigation into BoEE rule re-writes as required by the Governor's Executive Order
33 and hopes to have first draft at the June Board Meeting.

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Agency Update:

Rhonda McRina has chosen to step down from the Board. The Iowa Talent bank and the Governor’s office have been informed. Lori Lavorato has been hired as a new investigator for the BoEE and started in late January. The BoEE received 35 % of our 2023 cases in the last 180 days of the year and cases came to a total of 235 for 2023. This was an increase of 8% over last year and similar to the previous 2 years. The BoEE has received 45 Cases so far this year. Beth and Joanne have met with Legislators regarding concern with the amount of cases we have and the timeliness in processing. Investigative staff, Beth and Director Cavin will be meeting twice a month to work on decreasing the backlog.

Financial Report:

Financials have been included. For FY 24, the BoEE is behind about 16%, due to a combination of factors, such as new the renewal process (less \$35) and a decrease in applications (down about 2,500). The office also has a new copier/office printer that has bene installed. New Chromebooks for Board Members is still being evaluated. New BoEE staff computers are being considered for next year, as our tech support will be shifting to the DE and they request all staff have specific computers to expedite service.

License Report:

Renewals are just over 3 weeks out. Online requests for use of substitutes to start a year, extended time for substitute authorization holders, and expansion of Paraeducators are open. As of Wednesday February 21st, 390 out of 416 requests have been approved for open positions.

Typically, investigation reports are not reviewed in March due to it being a Zoom meeting. Currently, the March meeting is schedule for March 20th. BoEE staff can have investigation reports ready to review. The Board discussed moving the meeting to Friday, March 22nd in Des Moines to review investigation reports. Des Moines is a possible location for the Board retreat held in June. Board work and topics to cover

1 during the retreat was also discussed. There have been continuing discussions for
2 additional Board members.

3

4 Rules:

5 Adopt

6 Eric St Clair moved, with a second by Kathy Behrens, that the board adopt the
7 proposed changes to IAC 282 Chapter 11, COMPLAINTS, INVESTIGATIONS, CASE
8 HEARINGS, Amend IAC 282 Chapter 12, FEES. **MOTION CARRIED UNANIMOUSLY.**

9

10 Reports

11 A draft of the Board meeting calendar for FY 24 was proposed. A suggestion was made
12 to change the proposed Zoom meeting dates for next year to be full in-person meetings
13 instead and move those proposed dates from Wednesday to Friday.

14

15 There being no further business, Kristen Rickey moved, with a second by Ryan
16 Weldon, to adjourn the meeting at 2:25 p.m. **MOTION CARRIED UNANIMOUSLY.**

To: BoEE - Executive Director, Mike Cavin
 cc: Mirela Jusic

From: Mike Cornelison

Date: March 1, 2024

Re: **FY 2024 FINANCIAL ANALYSIS**
Period 8 -February 2024

NOTE 1: Cash Balance Review

Unit	Current Cash Balance	Projected FYE Carry Forward
9397 - BoEE	\$1,566,170	\$1,610,097
	<u>\$1,566,170</u>	<u>\$1,610,097</u>

Areas to Monitor:

RED:

YELLOW:

GREEN: Final Y-E Cash Carry Forward to FY2024 completed in August.
FY2023 GAAP Package completed August 31.

Outstanding issues that may affect the financial statements

Questions and review of financials:

Accounting conventions:

Financial statements have been prepared on the cash basis.
For Fiscal 2024, October & April are "3 Payroll" months.
Budget or forecast updates will be discussed during the monthly financial review meetings and will be included in the next months financials.

Other Information:

mike.cornelison@iowa.gov 515-336-9435

Fund: 0001 General Fund

Unit: 9397
Sub Unit: Blank

FY 2024

EDas Customer Number: 1100
Percent of Year Complete: 67%

Appropriation: I54 Board of Educational Examiners

Table with 20 columns (Obj/Rev Class, Obj/Rev Class Name, JULY-DEC, JAN-FEB, MAR-MAY, JUNE, HO13-HO15, YTD, End of Year Forecast, Annual Budget, Percent of Budget, Percent of Budget) and 40 rows of financial data including Revenue Collected and Expenditures.

FOOTNOTES

Revenues

234 Gov Transfer In Other Agencies - Includes WebSpec Reimbursement.

Expenditures

- 101 Personal Services - October & April have 3 payroll warrants written.
202 In State Travel - Employee travel and Board Meeting expense.
205 Out Of State Travel - December includes a NASDTEC event registration (B Myers)
401 Communication - Cell phone and ICN Voice usage.
402 Rentals - Facility lease & exhibit booths for trade events.
405 Prof & Scientific Services - payments to school districts for Board Member per diem & substitute reimbursements.
406 Outside Services - Includes the office cleaning service.
414 Reimbursements to Other Agencies - DAS services. Jan includes the quarterly Workers Comp allocation of \$901.
418 IT Outside Services - WebSpec Design costs, & Insight desktop support.
October & December expense includes \$95,484 for a Professional Practices update & migration to the Salesforce system. The cost for this project was budgeted in Expense Class 416.
432 Attorney General Reimbursement - Jan contains AG billings for July - Nov.
434 Gov Transfer Other Agencies - DCI criminal history & background checks & DIA services.
501 Equipment - Jan expense is for a copier replacement.
503 Equipment-Non Inventory - Forecast includes the purchase of 12 Chromebooks.
602 Other Expenses & Obligations - TOS credit card processing fees.

Table with 2 columns: Job Class, Board Members. Lists board members and their job classes.

Table with 4 columns: Job Class, Employee Name, Budgeted, Filled. Lists employee details for various job classes.

Fund: 0001 General Fund
 Unit: 9397
 Sub Unit: Blank
 Appropriation: I54

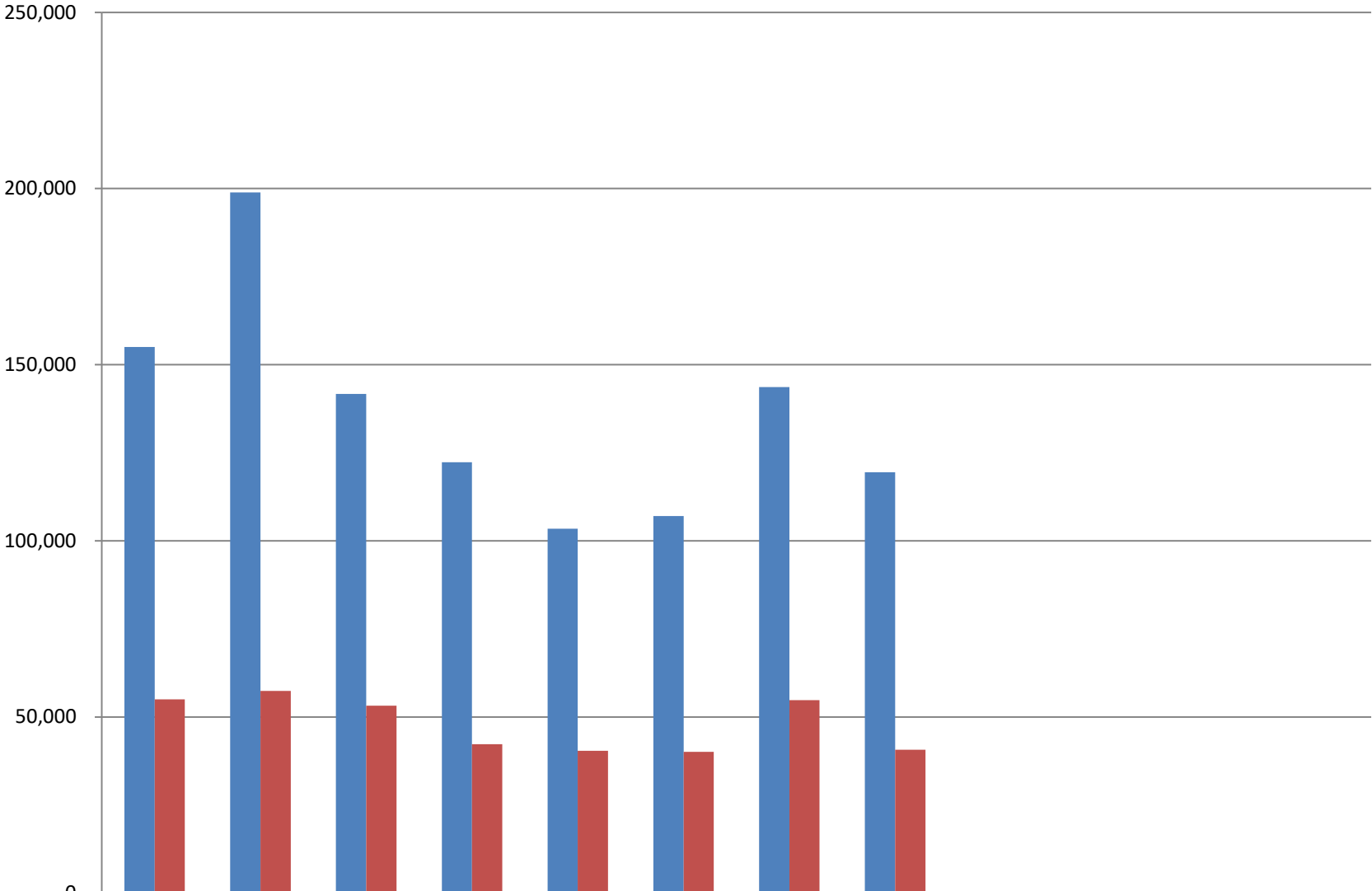
Board of Educational Examiners

Obj/Rev Class	Obj/Rev Class Name	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	HO13	HO14	HO15	YTD
		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Actual
Appropriation																	
BBF																	
Revenue Collected																	
234	Gov Transfer In Other Agencies	0	0	0	0	120	0	120	74	0	0	0	0	0	0	0	314
401	Licensure Fees	155,033	198,935	141,664	122,289	103,442	107,060	143,671	119,445	0	0	0	0	0	0	0	1,091,538
501	Refunds & Reimbursements	0	0	0	765	0	0	0	0	0	0	0	0	0	0	0	765
704	DCI Check Fees	54,965	57,355	53,168	42,250	40,345	40,103	54,790	40,655	0	0	0	0	0	0	0	383,631
Total Revenues:		209,998	256,290	194,832	165,304	143,907	147,163	198,581	160,173	-	-	-	-	-	-	-	1,476,248
234 Gen Fund	Licensure Fees % - Other Agcy								21								21
401 Gen Fund	Licensure Fees	48,808	62,606	44,609	38,545	32,554	33,686	45,171	37,654								343,633
Total General Fund		48,808	62,606	44,609	38,545	32,554	33,686	45,171	37,675	0	0	0	0	0	0	0	343,654
Total Receipts		258,805	318,896	239,441	203,849	176,461	180,849	243,752	197,848	-	-	-	-	-	-	-	1,819,902
	YTD vs Prior Year	-13%	-19%	-16%	-15%	-17%	-16%	-16%	-15%								

Note -
 General Fund 0001-996-2820

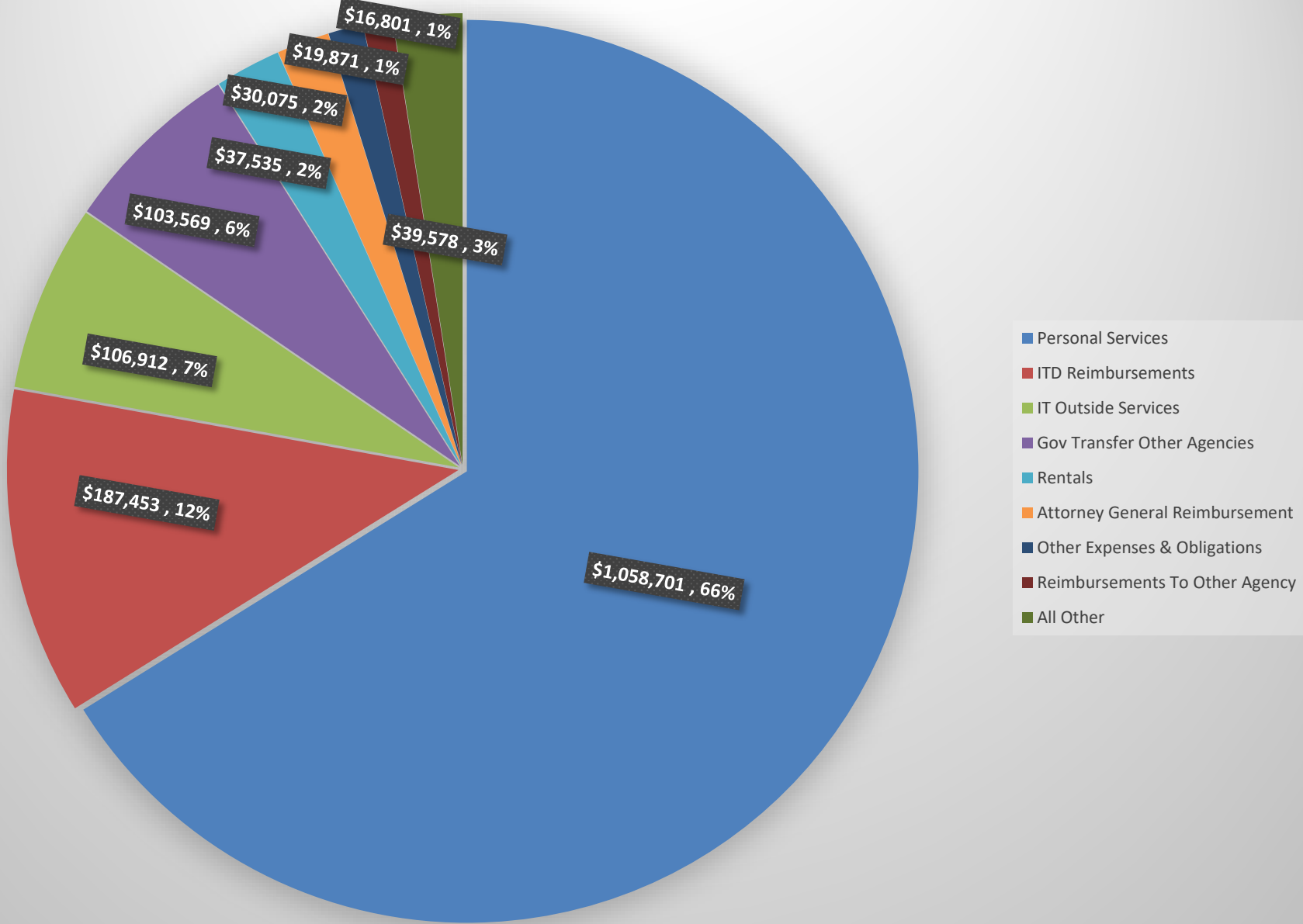
Obj/Rev Class	Obj/Rev Class Name	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	HO13	HO14	HO15	YTD
		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
Appropriation																	
BBF																	
Revenue Collected																	
234	Gov Transfer In Other Agencies	0	0	6,480	0	0	0	0	86	94	0	0	0	0	14,095	0	20,755
401	Licensure Fees	182,210	251,971	133,519	129,308	146,325	116,068	171,526	128,579	161,010	137,246	140,916	277,678	19,641	0	0	1,995,997
704	DCI Check Fees	58,735	79,675	74,390	57,195	59,250	47,235	62,905	44,640	57,105	45,750	42,075	61,105	4,460	0	0	694,520
Total Revenues:		240,945	331,646	214,388	186,503	205,575	163,303	234,431	173,305	218,208	182,996	182,991	338,783	24,101	14,095	0	2,711,271
234 Gen Fund	Licensure Fees % - Other Agcy			21					29	6							56
401 Gen Fund	Licensure Fees	57,934	80,056	42,561	41,151	46,495	36,871	54,509	40,871	51,189	43,608	44,769	88,245	6,265	0	0	634,524
Total General Fund		57,934	80,056	42,583	41,151	46,495	36,871	54,509	40,900	51,195	43,608	44,769	88,245	6,265	0	0	634,580
Total Receipts		298,879	411,702	256,971	227,654	252,070	200,174	288,940	214,205	269,403	226,604	227,760	427,028	30,366	14,095	0	3,345,851

Receipts July 2023-June 2024



■ Licensure Fees	155,033	198,935	141,664	122,289	103,442	107,060	143,671	119,445	0	0	0	0
■ DCI Check Fees	54,965	57,355	53,168	42,250	40,345	40,103	54,790	40,655	0	0	0	0

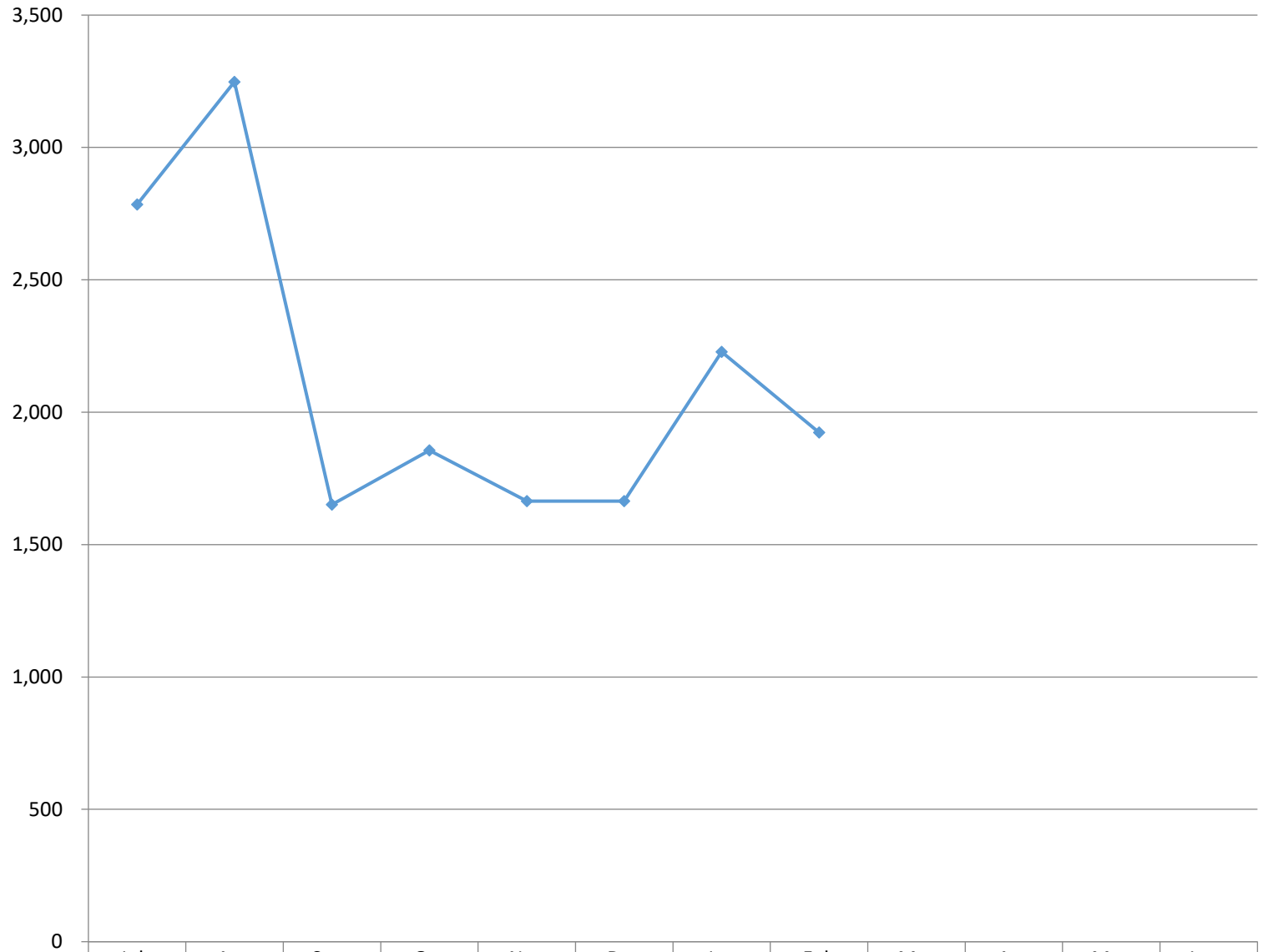
Expenditures July 2023-June 2024



Obligations vs. Budget Report
Budget Fiscal Year: 2024

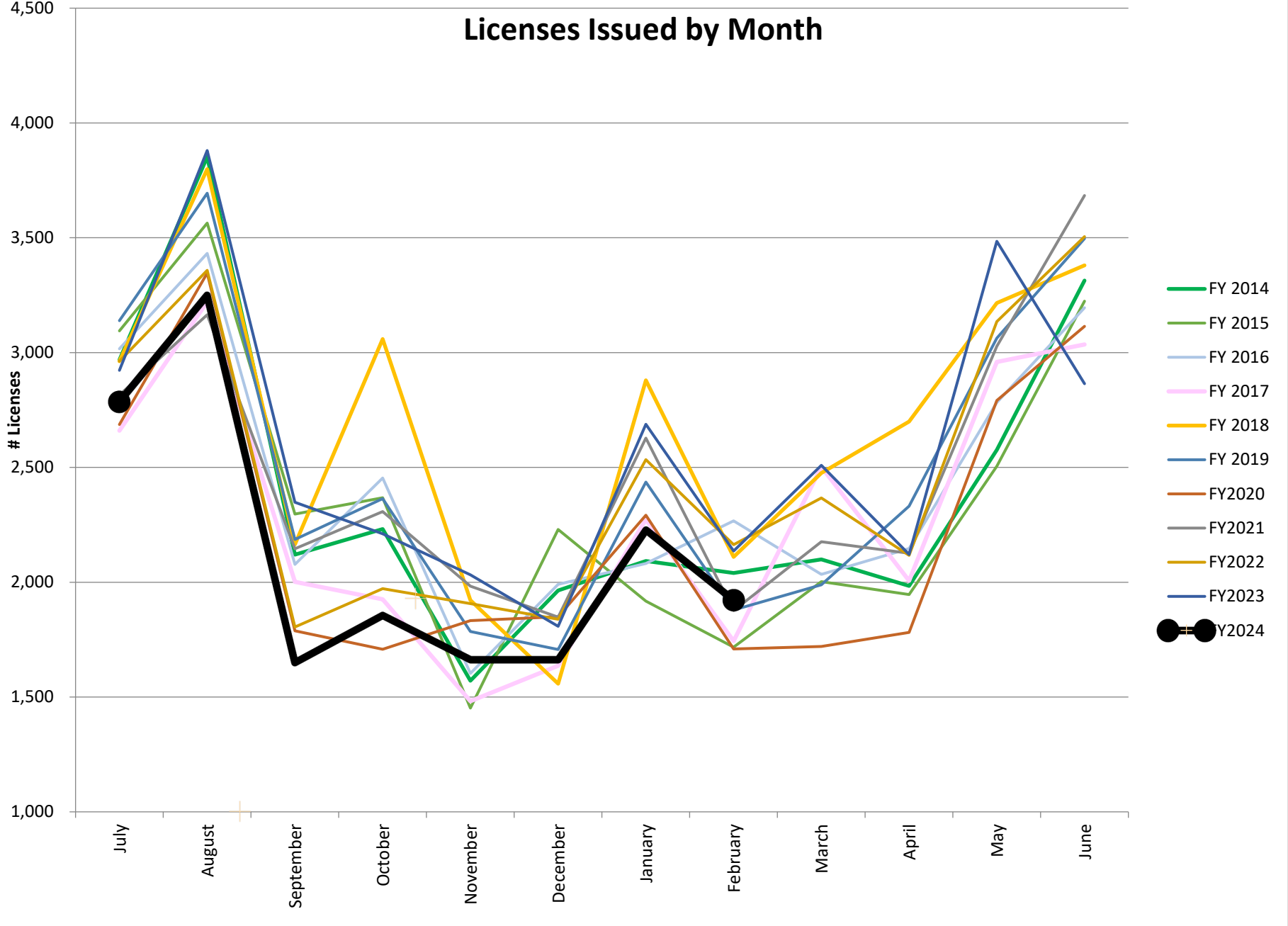
	Actual To-Date	FY-Encumbered	Total Obligations FY-To-Date	FY 24 Budget	Budget Balance	Percent of Budget Received /Spent
Resources -						
Balance Forward	1,696,717		1,696,717	1,637,177		
234 Gov Transfer In Other Agencies	314		314	6,500		
401 Fees, Licenses & Permits	1,091,538		1,091,538	1,950,000		
704 Other	383,631		383,631	680,000		
Total Resources	\$3,172,200	\$0	\$3,172,200	\$4,273,677		
(Total Revenues)	<u><u>\$1,475,483</u></u>	<u><u>\$0</u></u>	<u><u>\$1,475,483</u></u>	<u><u>\$2,636,500</u></u>	\$1,161,017	56%
Expenditures -						
101 Personal Services	1,058,701		1,058,701	1,643,026	584,325	64%
202 In State Travel	7,673		7,673	20,000	12,327	38%
205 Out Of State Travel	1,925		1,925	20,000	18,075	10%
301 Office Supplies	7,082		7,082	10,000	2,918	71%
302 Facility Maintenance Supplies	0		0	1,000	0	0%
308 Other Supplies	0		0	400	400	0%
309 Printing & Binding	0		0	3,500	3,500	0%
313 Postage	2,792		2,792	12,500	9,708	22%
401 Communications	11,305		11,305	20,000	8,695	57%
402 Rentals	37,535		37,535	71,500	33,965	52%
403 Utilities	1,454		1,454	4,000	2,547	36%
405 Prof & Scientific Services	1,857		1,857	5,000	3,143	37%
406 Outside Services	3,208		3,208	6,000	2,792	53%
408 Advertising & Publicity	0		0	200	200	0%
409 Outside Repairs/Service	0		0	1,000	1,000	0%
414 Reimbursements To Other Agency	16,801		16,801	25,000	8,199	67%
416 ITD Reimbursements	187,453		187,453	550,000	362,547	34%
418 IT Outside Services	106,912		106,912	35,000	(71,912)	305%
432 Attorney General Reimbursement	30,075		30,075	85,000	54,925	35%
434 Gov Transfer Other Agencies	103,569		103,569	455,000	351,431	23%
501 Equipment	6,282	6,282	12,564	6,500	(6,064)	193%
502 Office Equipment	0		0	250	250	0%
503 Equipment-Non Inventory	0		0	16,500	16,500	0%
510 IT Equipment & Software	1,952		1,952	12,000	10,048	16%
602 Other Expenses & Obligations	19,871		19,871	42,000	22,129	47%
702 Fees	0		0	30	30	0%
705 Refunds-Other	330		330	5,000	4,670	7%
Total Expenditures	<u><u>\$1,606,778</u></u>	<u><u>\$6,282</u></u>	<u><u>\$1,613,060</u></u>	<u><u>\$3,050,406</u></u>	<u><u>\$1,436,346</u></u>	53%
CY Revenue Less Expenditures	<u><u>(\$131,295)</u></u>					
Estimated Carry Forward	<u><u>\$1,565,422</u></u>					

Total # Licenses Issued FY24



	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Total # Transactions Processed	2,785	3,248	1,651	1,856	1,664	1,664	2,228	1,923				

Licenses Issued by Month



Number of Licenses Issued by Month

	July	August	September	October	November	December	January	February	March	April	May	June	Total number of Licenses Issued
FY 2024	2,785	3,248	1,651	1,856	1,664	1,664	2,228	1,923					17,019
Running Total	2,785	6,033	7,684	9,540	11,204	12,868	15,096	17,019	17,019	17,019	17,019	17,019	
FY 2023	2,923	3,880	2,348	2,211	2,032	1,808	2,688	2,136	2,509	2,121	3,485	2,865	31,006
Running Total	2,923	6,803	9,151	11,362	13,394	15,202	17,890	20,026	22,535	24,656	28,141	31,006	
FY 2022	2,962	3,358	1,805	1,972	1,907	1,839	2,534	2,164	2,367	2,117	3,135	3,505	29,665
Running Total	2,962	6,320	8,125	10,097	12,004	13,843	16,377	18,541	20,908	23,025	26,160	29,665	
FY 2021	2,815	3,165	2,146	2,308	1,983	1,848	2,628	1,876	2,176	2,126	3,027	3,684	29,782
Running Total	2,815	5,980	8,126	10,434	12,417	14,265	16,893	18,769	20,945	23,071	26,098	29,782	
FY 2020	2,687	3,346	1,788	1,708	1,833	1,850	2,292	1,709	1,720	1,781	2,791	3,114	26,619
Running Total	2,687	6,033	7,821	9,529	11,362	13,212	15,504	17,213	18,933	20,714	23,505	26,619	
FY 2019	3,139	3,694	2,186	2,364	1,785	1,707	2,436	1,879	1,989	2,331	3,063	3,496	30,069
Running Total	3,139	6,833	9,019	11,383	13,168	14,875	17,311	19,190	21,179	23,510	26,573	30,069	
FY 2018	2,962	3,799	2,165	3,059	1,922	1,558	2,879	2,110	2,476	2,700	3,216	3,380	32,226
Running Total	2,962	6,761	8,926	11,985	13,907	15,465	18,344	20,454	22,930	25,630	28,846	32,226	
FY 2017	2,660	3,221	2,002	1,926	1,482	1,636	2,273	1,744	2,502	2,007	2,959	3,035	27,447
Running Total	2,660	5,881	7,883	9,809	11,291	12,927	15,200	16,944	19,446	21,453	24,412	27,447	
FY 2016 Actual	3,017	3,432	2,078	2,454	1,603	1,991	2,082	2,267	2,034	2,147	2,783	3,195	29,083
Running Total	3,017	6,449	8,527	10,981	12,584	14,575	16,657	18,924	20,958	23,105	25,888	29,083	
FY 2015 Actual	3,095	3,564	2,297	2,368	1,452	2,230	1,918	1,717	2,003	1,946	2,505	3,224	28,319
Running Total	3,095	6,659	8,956	11,324	12,776	15,006	16,924	18,641	20,644	22,590	25,095	28,319	
FY 2014 Actual	2,968	3,852	2,120	2,232	1,571	1,964	2,092	2,040	2,099	1,984	2,576	3,314	28,812
Running Total	2,968	6,820	8,940	11,172	12,743	14,707	16,799	18,839	20,938	22,922	25,498	28,812	
FY 2013 Actual	2,744	3,375	1,978	2,488	1,849	1,920	2,231	2,068	2,246	2,188	2,956	3,219	29,262
Running Total	2,744	6,119	8,097	10,585	12,434	14,354	16,585	18,653	20,899	23,087	26,043	29,262	

FY2024 Actual Number of Transactions Processed per Month

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total Issued
Add - Add Administrator Endorsement (Iowa Institution)	7	1	5	3		6	9						31
Add - Add Administrator Endorsement (Out of State Institution)		0		1		1	2	0					4
Add - Add Concentration Para	17	15	12	1	7	8	8	7					75
Add - Add Teaching Endorsement (Iowa institution will be recommendatation)	78	98	32	39	18	74	105	69					513
Add - Add Teaching Endorsement (state min. requirements or non-Iowa institution)	38	64	26	16	14	17	35	27					237
Convert - Exchange to a Full License	9	13	4	6	4	3	2	7					48
Convert - Exchange to a Full License (Reciprocity Only)	7	4	6	3	3	3	2	1					29
Convert - Initial Career and Tech/Prelim. Native Language Speaker to Full Auth.	2	6	2	5	1		4	1					21
Convert - Initial School Administrative Manager to Full SAM			1		1	2							4
Convert - Standard to Master Educator	89	98	74	60	59	60	109	71					620
Convert - Temporary or Initial School Business Official to next SBO level	2	3	2	3		4	1	5					20
Convert Initial Administrator to Professional Administrator	12	3	4	2	1								22
Convert Initial Teacher/PSL to Standard/PSL	173	81	15	20	17	20	40	32					398
Extension - Extension of Class A Class B or Admin Exchange License	19	59	7	16	8	4	4	5					122
Extension - Extension of Coaching Authorization	43	38	24	24	19	15	19	12					194
Extension - Extension of Full Authorization (not coaching)	2	4	2	4	5	7	4	4					32
Extension - Extension of Initial Teacher/Admin (experience met within one year)	15	22	3	6	1	2	2	6					57
Extension - Extension of Standard Master Prof Admin or Auth (not coach)	53	122	38	69	52	48	53	60					495
Extension - Final Extension of Initial Teacher (not meeting teaching standards)	3	6	1	1	1								12
New - Conditional License: Class B - Administrator	8	8	2	4		4	1						27
New - Conditional License: Class B - Teacher General Education	100	155	23	62	19	14	15	20					408
New - Conditional License: Class B - Teacher Special Education	75	102	29	24	9	5	12	8					264
New - Conditional License: Executive Director Design - Special Education	31	42	5	13	6	8	8	1					114
New - Content Specialist Authorization (Step 1 Transcript Eval)	0	0		0	0	0	0	0					0
New - Content Specialist Authorization (Step 2 "Processing")	2	2		1	1			1					7
New - Executive Director Decision License	38	58	14	20	7	9	6	1					153
New - First Activities Administrator Authorization	1						1	3					5
New - First Administrator License (Out of State Preparation)	7	10	7	9	4	4	14	15					70
New - First Behind the Wheel Driving Instructor Authorization	3	10	6	3	2	3	5	1					33
New - First Career and Technical Authorization	22	13	1	6	3	4	2	3					54
New - First Class G License (counseling internship needed - Out of State only)	4	1	2	1			1	3					12
New - First Coaching Authorization (in lieu of a coaching on a teaching license)	248	287	131	184	184	143	157	181					1,515
New - First Evaluator License (do not use if applying for/hold admin. license)	5	3	4	1		2	1	1					17
New - First iJAG Authorization	1	13	1	5	1	2	2						25
New - First Intern School Psychologist	5												5
New - First Iowa Administrator License (Iowa Institution)	19	39	17	17	7	12	13	11					135
New - First Iowa Substitute License (holds valid/expired Iowa teaching license)	54	96	46	33	26	28	42	26					351
New - First Iowa Substitute License (Out of State is not seeking teaching license)	9	18	16	11	6	12	12	8					92
New - First Iowa Teaching Counseling or Class G license (Iowa Institution)	59	66	143	135	238	224	332	240					1,437
New - First Iowa Teaching License (Out of Country Step 1 Transcript Eval)	0	0	0	0		0	0	0					0
New - First Iowa Teaching License (Out of Country Step 2 "Processing")	10	9	3	3	2	2	2	6					37
New - First Iowa Teaching License (Out of State Institution)	120	84	33	34	27	36	60	53					447
New - First Native Language Speaker Authorization	2	4		1			1						8
New - First Orientation and Mobility License		1					2						3
New - First Paraeducator Certificate	41	83	32	33	37	44	20	22					312
New - First Prof Svc License: Counsel (Out of State Institution)	5	2	1	1		1	1	2					13
New - First Professional Service Counseling SLP School Psy etc (Out of State)	5	4	2		2	2	1	2					18
New - First SAM Authorization	0	1		1									2
New - First School Business Official Authorization: Temporary or Initial SBO	2	3	2	1	4	6	3	3					24
New - First Statement of Professional Recognition - Other	34	23	11	19	1	5	4	4					101
New - First Statement of Professional Recognition - School Nurse	5	10	5	3	3	2							28
New - First Substitute Authorization (have not completed teacher prep program)	180	305	225	225	236	241	267	224					1,903
New - First Teacher Intern License (Iowa Preparation Only)	19	60	2	2	2	1	9	3					98
New - First Work Based Learning Supervisor Authorization		1		2			2						5
New - International Exchange Teaching License: Teachers from Spain			11	1									12
New - Preservice Substitute Authorization	1	1											2
New - Temporary Initial license (Iowa grad only)													0
New - Transitional Coaching Authorization (has not completed coaching auth)	12	19	8	13	16	5	4	11					88
Renew - Behind the Wheel	13	6	6	16	33	40	14	9					137
Renew Activities Administrator Authorization	1	1				1		1					4
Renew - Administrator/Evaluator License	50	20	17	19	18	20	27	8					179
Renew - Coaching Authorization	153	198	132	156	129	81	129	171					1,149
Renew - iJAG Authorization		1											1
Renew - Initial Admin	13	9	2	4	1	2	1	3					35
Renew - Initial Teacher Initial Admin or Initial Professional Service License	36	34	16	20	7	12	15	17					157
Renew License or Authorization - Advanced Degree and 10 Years Experience		1	0	0	0	3	0	2					6
Renew - Para Certification	17	22	15	13	9	11	26	16					129
Renew - School Administrator Manager (Initial or Full SAM)	1	1		1				1					4
Renew - School Business Authorization (Full SBO)	5	4	4	5	6	3	8	7					42
Renew - Standard Master Professional Service Career and Technical or OM	455	429	247	275	257	236	345	283					2,527
Renew - Statement of Professional Recognition	11	23	14	12	13	13	16	9					111
Renew - Substitute Authorization	40	56	29	37	22	26	36	30					276
Renew - Substitute License or Substitute Authorization	68	74	52	54	42	30	50	56					426
Transcript Analysis Fee	226	199	77	97	73	93	162	150					1,077
Other Printed Copy of License	13	12	3	3	7	4	5	4					51
Misc Fee/Overpayment	2	3	1	7	4	4	11	6					38
Late Fee (Endorsed/Expired)	113	109	31	103	43	15	14	15					443
Late Fee (No License)													0
Military Discount													0
Convenience Fee	3,295	3,743	1,944	2,245	2,025	1,947	2,657	2,223					20,079
Background Renewal	1,679	1,497	920	1,007	911	832	1,256	1,022					9,124
Background	617	784	532	530	593	545	653	563					4,817
Total # Transactions Processed	2,785	3,248	1,651	1,856	1,664	1,664	2,228	1,923	0	0	0	0	17,019

DISCUSSION MEMO

Date: March 22, 2024

To: Board Members

From: Mike Cavin, Executive Director

RE: Amend IAC 282 Chapter 22 - Authorizations

The following amendments will allow a new endorsement option for career and technical authorizations.

Amend the following subrule **282—22.9(3)c**:

c. Applicants ~~shall~~ will meet one of the following qualifications:

- (1) 6,000 hours of recent and relevant experience;
- (2) 4,000 hours of recent and relevant experience if the applicant holds a baccalaureate degree;
- (3) 3,000 hours of recent and relevant experience if the applicant holds an associate's degree in the teaching endorsement area sought, if such a degree is considered terminal for that field of instruction;
- (4) Hold a baccalaureate or graduate degree or closely related degree in the teaching endorsement area sought; or
- (5) Hold a baccalaureate degree in any area of study if at least 18 of the credit hours were completed in the teaching endorsement area sought.

(6) For a career and technical cluster endorsement, 6,000 hours of recent and relevant experience or 4,000 hours of recent and relevant experience if the applicant holds a baccalaureate degree in the cluster area sought, and 2000 hours of recent and relevant experience or 9 semester hours in three areas within the cluster endorsement.

Recent and relevant experience ~~shall~~ will have been accrued within the ten years prior to the date of application. Experience that does not meet these criteria may be considered at the discretion of the executive director. In subjects for which state registration, certification or licensure is required, the applicant ~~must~~ will hold the appropriate license, registration or certificate before the initial career and technical secondary authorization or the career and technical secondary authorization will be issued.

IOWA BOARD OF EDUCATIONAL EXAMINERS

Board Meeting Calendar Fiscal Year 2024

Day(s) of week Date	Location	Other Information
July 2023 NO MEETING		
Wednesday, August 2, 2023	Grimes Bldg. (State Bd. Rm.)	
Friday, September 8, 2023	Grimes Bldg. (State Bd. Rm.)	
Friday, October 13, 2023	BoEE Office	Zoom Meeting at 10:00 a.m
Wednesday, November 8, 2023	Grimes Bldg. (State Bd. Rm.)	
Friday, December 15, 2023	Grimes Bldg. (State Bd. Rm.)	
Thursday, January 11, 2024	Grimes Bldg. (**B100**)	
Friday, February 23, 2024	Grimes Bldg. (State Bd. Rm.)	
Wednesday, March 22, 2024	Grimes Bldg. (**B100**)	
Friday, April 19, 2024	Grimes Bldg. (State Bd. Rm.)	
Friday, May 17, 2024	Grimes Bldg. (State Bd. Rm.)	
Thursday & Friday, June 20-21, 2024	Grimes Bldg. (**B100**)	Board Retreat Board Meeting
July 2024 NO MEETING		
Friday, August 9, 2024	Grimes Bldg. (**B100**)	

IOWA BOARD OF EDUCATIONAL EXAMINERS

Board Meeting Calendar Fiscal Year 2025

Day(s) of week Date	Location	Other Information
July 2024 NO MEETING		
Friday, August 9, 2024	Grimes Bldg. (**B100**)	
Friday, September 13, 2024	Grimes Bldg.	
Friday, October 18, 2024	Grimes Bldg.	
Friday, November 15, 2024	Grimes Bldg.	
Friday, December 13, 2024	Grimes Bldg.	
Friday, January 17, 2025	Grimes Bldg.	
Friday February 14, 2025	Grimes Bldg.	
Friday, March 14, 2025	Grimes Bldg.	
Friday, April 11, 2025	Grimes Bldg.	
Friday, May 16, 2025	Grimes Bldg.	
Thursday & Friday, June 19-20, 2025	TBD	Board Retreat Board Meeting
July 2025 NO MEETING		
Friday, August 8, 2025	Grimes Bldg.	