April 2012
Strategies for Fiscal Health:
The Long-Term Perspective
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ISAC’s Mission:
To promote effective and responsible county government for the people of Iowa.

ISAC’s Vision:
To be the principal, authoritative source of representation, information and services for and about county government in Iowa.
Strategies for Fiscal Health: The Long-Term Perspective

By: Jeffrey Schott
University of Iowa Institute of Public Affairs Director

As counties cope with the challenges of our current tough economic conditions, considerable attention is focused on immediate, short-term budgetary issues. But it is equally important that counties maintain a long-term outlook on their financial situation. The purpose of this article is to suggest several strategies by which counties can promote their long-term fiscal health.

Strategic Budgeting
Especially in periods of limited financial resources, policy makers should adopt a strategic approach to budgeting. Establishing priorities and developing benchmarks can provide direction to policy-makers and help local governments stay on course.

The National Advisory Council on State and Local Budgeting (NACSLB) recommends a goal-oriented approach to budgeting based on the following framework:

Principle I – Establish broad goals to guide government decision-making:
• Assess community needs, priorities, challenges and opportunities
• Identify opportunities and challenges for government services, capital assets, and management
• Develop and disseminate broad goals

Principle II – Develop approaches to achieve goals
• Adopt financial policies
• Develop programmatic, operating, and capital policies and plans
• Develop programs and services that are consistent with policies and plans
• Develop management strategies

Principle III – Develop a budget with approaches to achieve goals
• Develop a process for preparing and adopting a budget
• Develop and evaluate financial options
• Make choices necessary to adopt a budget

Principle IV - Evaluate performance and make adjustments
• Monitor, measure, and evaluate performance
• Make adjustments as needed

Reconciling Short- and Long-Range Planning
Recognize the longer-term financial impacts of short-term budget decisions. Capital projects, debt financing of such projects, and many annual budget decisions affect budgets far into the future. Identify the projected costs operating and/or personnel costs associated with providing current and anticipated services, projects, and programs (adjusted for inflation) before committing to the initial funding of that item.

Guard against making short-term budget decisions at the expense of longer-term needs. Examples of such situations are unfortunately quite commonplace: spending down fund balances accumulated over a period of time for designated purposes (such as specific capital projects or equipment/vehicle replacement), deferring maintenance projects, or transferring funds from the General Fund to proprietary funds (or vice versa) solely to prop up the fund in question.

Financial Planning and Analysis
A variety of financial planning and analysis tools can provide counties – regardless of size - the necessary information base and guidelines for effective strategic budgeting and planning. They can assist policy-makers to evaluate the short-and long-range impact of budget proposals. They can help elected officials see the “big picture” and prioritize proposals or projects at the same time, rather than on an individual or stand-alone basis.

Financial Trend Analysis – A county needs to know the state of its financial condition. Periodic monitoring and evaluation of financial data and trends, including multi-year forecasting of revenues and expenditures, can assist elected officials think strategically about priorities and needs.

Financial Policies – Financial policies establish guidelines pertaining to key elements such as revenues, operating expenditures, capital expenditures, reserve funds, fund balances, investments, debt management, enterprise funds, accounting, auditing and reporting. Carefully developing and monitoring meaningful financial policies, such as establishing and maintaining fund balances as a percentage of fund expenditures or per capita debt service expenditures, can provide very useful guidelines to assist elected officials in making difficult budget decisions.
Capital Improvements Program (CIP) – The CIP is a multi-year (typically three to 10 year) program for the planning, scheduling, and financing of large construction, infrastructure and improvement projects, and purchasing of major pieces of equipment. The CIP helps prioritize capital spending needs and provides useful information about upcoming major expenditures.

Equipment/Asset Replacement Plan – Similar to the CIP, this is typically a five- to 20-year plan identifying the scheduled replacement of equipment, vehicles, facilities and other physical assets. Like the CIP, it helps policy makers anticipate and plan for upcoming major expenditures beyond the standard one-year budget cycle.

Contingency Planning – During times of financial uncertainty, it can be quite helpful to develop budget contingency plans, especially for revenue shortfalls. Certain revenue sources, such as state funding or local option sales taxes, can be extremely volatile during these periods. Developing advance contingency plans allows for more deliberate and careful analysis of alternatives and options as opposed to “crisis mode” emergency response.

Stimulating Economic Growth
As discussed in the recent White Paper “Navigating the Fiscal Crisis: Tested Strategies for Local Leaders," prepared by the Alliance for Innovation and International City/County Management Association, one of the best methods for counties to stimulate their local economies may be to maintain current expenditures and expand capital improvements, provided local revenues, reserves, interest rates and federal programs make it possible. Of course, these conditions rarely occur during economic downturns. It is more likely that county expenditures get reduced, which in turn may negatively impact economic development in the community.

The White Paper suggests that periods of economic distress may offer the most opportune time to promote local economic development efforts. Private sector firms tend to be more sensitive to the impacts of economic development incentives, because their profit margins may be smaller and their cash flow more constrained.

Recognizing that direct cash outlay may be problematic for local governments during these downturns, the White Paper identifies other opportunities to entice economic development, including infrastructure, skilled available workforce, job training, educational institutions, and streamlining project reviews. Finally, the White Paper points out that a period of resource scarcity is an appropriate time for jurisdictions in a region to share economic development incentives and benefits.

Citizen Engagement
Effectively dealing with long-term financial issues is not easy. Difficult decisions have to be made. It is crucial to develop strategies and methods to inform, listen to, and involve a broad base of community members in this process. Such an approach benefits both citizens and elected officials.

For citizens:
• They learn more about the issues and decision-making processes.
• An effective citizen engagement process can lead to creating partnerships for solving problems.
• The process allows citizens to provide real input on policy decisions.
• The process can create a strong sense of buy-in and belonging.

For local officials:
• A citizen engagement process can demonstrate to citizens that certain public decisions are difficult and complex.
• The process helps citizens understand the financial pressures that affect services and programs.
• The process helps elected officials find out what citizens really think about important issues and policy decisions.
• The process can help defuse tensions between groups of people and between citizens and government.

Of course, the citizen engagement process is not absolute. Elected officials are still responsible for setting policies and making decisions for the county - and the local elected leadership team is still ultimately responsible for the overall success and vitality of the county – with citizen guidance, input and engagement.
On March 2, the House appropriations committee introduced HJR 2010, which proposes two amendments to the Constitution of the State of Iowa regarding state budgets and state revenue. The first amendment creates a state general fund expenditure limitation of 99% of the adjusted revenue estimate, as determined by the revenue estimating conference. The amendment requires both the governor and the general assembly to use the expenditure limitation in preparing their respective budgets. The governor is prohibited from approving a final budget that exceeds the expenditure limitation.

This amendment also provides that 95% of any new revenue source must be included in the expenditure limitation. Any year-ending surplus exceeding 10% must be transferred to the taxpayers trust fund. Surpluses less than 10% may be included in the following year’s adjusted revenue estimate if approved by at least three-fifths of the members of each house. The amendment requires that any new or expanded authority to issue revenue or appropriations bonds must be approved by at least two-thirds of the members of each house. In addition, these revenues are required to be included in the annual state general fund expenditure limitation.

The second amendment provides that any bill that impacts the state income tax or the state sales and use tax, and which causes an aggregate increase in state tax revenues must be adopted by at least three-fifths of the members of each house. The amendment also requires a three-fifths majority vote of the members of each house in order to enact a new state tax.

In order to become part of the state constitution, this proposal must receive approval from two consecutive general assemblies in identical format and then be ratified by a majority vote of the people. The measure does not go before the Governor for consideration as is the case for all other legislation. If HJR 2010 is approved by the second session of the 84th General Assembly this year, it must be passed in the same form by the 85th General Assembly in either their first or second session. In either case, the measure would then go before the voters in the 2014 General Election. If approved by voters, it becomes an amendment to the Iowa Constitution.

This resolution differs from prior attempts to amend Iowa’s constitution with spending limitations in that it does not require a vote of the people at a General Election to institute any tax increase of at least 1% of the state budget as the proposal passed in 2004 did. In addition, prior attempts at this type of legislation included property taxes and HJR 2010 only involves state revenues.

ISAC is registered against this legislation for two major reasons: first, we live in a representative democracy where a majority generally carries the day. Just as the United States Senate has been paralyzed by the need for a “super” majority, so will the Iowa Legislature be paralyzed. People are elected to office to make the hard public policy decisions. A working legislature needs flexibility in revenue raising and budgeting that can guide the state through lean economic times. If the voters are unhappy with decisions made by their elected representatives, they can express their dissatisfaction at the ballot box. That risk alone has a restraining effect on those who want to stay in office. Second, this spending limitation will make it extremely difficult for the state to generate additional revenues. When this occurs and the state’s residents need services, the responsibility will fall to local governments through unfunded mandates and local property taxes will rise.

Concepts like this have been enacted in a number of other states. A similar constitutional amendment called the Taxpayers’ Bill of Rights (TABOR) was approved by the Colorado voters in 1992. The experience in Colorado under TABOR staged a fiscal crisis by limiting taxes to a formula based on inflation and population growth. Combined with this policy in Colorado is another constitutional provision that requires annual spending increases on primary and secondary education. When the recent economic downturn hit a few years ago, state revenues plunged to unanticipated lows. Under TABOR, revenue increases were based at that new low point while education appropriations continued at previous base year levels. As a result, general fund revenues for the rest of the state budget were rapidly diminishing.

If HJR 2010 is ratified by Iowa’s voters, no one can predict exactly what the impacts will be. Just as in Colorado, Iowa has a strong tradition of supporting the K-12 system through the school finance formula. The pressure to continue growth in educational support while living under the constraints of HJR 2010 could have severe impacts on such areas as public safety, higher education and health care.
The case out of Mitchell County relating to the county’s ordinance prohibiting the use of steel or metal tires or wheels with cleats or other projections of any kind on the county’s hard surfaced roadways received quite a bit of press and attention. This is probably at least partially due to the fact that the Iowa Supreme Court actually traveled to Mason City to hear the oral arguments for the case – as a stop on a “road tour” being conducted by the Court as a part of its education and outreach program. The basic facts of the case are that Mitchell County’s ordinance prohibiting steel wheels on county roads was challenged as an unconstitutional restriction on religion by a young Mennonite that was charged with violating the ordinance. For most of the Iowa counties out there, you might be questioning the educational value the Court’s decision in this case has in your county. Granted, most Iowa counties do not likely have many persons using steel wheels with cleats, making the specific facts of this case somewhat limited in applicability to many counties.

But that doesn’t mean you shouldn’t pay attention to the Court’s analysis in this case. Because the underlying legal principle is First Amendment freedom of religion, which is an issue counties could face in several contexts. A few examples that come to my mind where freedom of religion issues could potentially be at stake include policies for accessing and using the court house grounds and ordinances for signs and billboard postings. And this case, Mitchell County vs. Zimmerman, is our state’s highest court’s most recent opinion on the matter. That being said, just because it’s the most recent doesn’t mean it will be the most applicable opinion out there to your facts – so always discuss scenarios that present potential freedom of religion concerns with your county attorney before taking action.

The Court began its analysis by reviewing a sampling of historical opinions on the Free Exercise Clause (freedom of religion). If you have such an issue in your county, reading this information could be very helpful – it not only gives you a summary of several important cases, but points you to the cases on the issue that the Court found important. In light of the historical review, the Court then considered several questions regarding the ordinance, in order to determine its constitutionality.

1. Is the ordinance facially neutral? The Court cited a U.S. Supreme Court case to explain that “[a] law lacks facial neutrality if it refers to a religious practice without a secular meaning discernible from the language or context.” The Court found the language of the ordinance was secular and nonreligious in context.

2. Is the ordinance operationally neutral? Here, the Court explained determining operational neutrality requires looking “beyond the language of the ordinance to determine whether there is ‘impermissible targeting.’” In regards the ordinance, the Court only stated “[t]his is not a case where new activity brushed up against a preexisting ordinance, but where an ordinance was passed to deal with a longstanding religious practice.”

3. Is the ordinance generally applicable? This prong of the analysis is largely a question of whether the ordinance is under or over inclusive. The Court explained that “the Free Exercise Clause appears to forbid the situation where the government accommodates secular interests while denying accommodation for comparable religious interests.” The Court ultimately found the Mitchell County ordinance to be under inclusive, because it allowed school buses to use ice grips and tire studs year around. The Court held this under inclusion was substantial, particularly in light of the fact the county chose not “to regulate various other sources of road damage besides steel wheels...” and instead “chose to prohibit only a particular source of harm to the roads that had a religious origin.”

4. Is the ordinance narrowly tailored and serving a compelling interest? Because the Court found the ordinance was not generally applicable due to under inclusiveness, the strict scrutiny test was applied to the ordinance. The strict scrutiny test is the most difficult for a government entity to prevail on – as the county “has the burden to show that the ordinance serves a compelling state interest and is the least restrictive means of attaining that interest.” On the matter of the compelling interest, the Court stated only that “[t]he district court found that the county has a compelling interest ‘in protecting the integrity of the county’s roads’” but the Court would not decide that issue. The Court then moved on to consider whether the ordinance was narrowly tailored and held

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Balancing Incentive Program/Conflict Free Case Management

If you have followed the MH/DD system redesign I am certain that you have all heard the term “conflict-free case management.” To explain conflict-free case management, I need to first give you a brief overview of the Balancing Incentive Program (BIP). Section 10202 of the Patient Protection and Affordable Care Act, titled the State Balancing Incentive Payment Program provides financial incentive to states to increase access to non-institutionally based long-term supports (LTSS). States that spend less than 50% of their long-term care dollars on community LTSS receive a 2% increase in Federal Medical Assistance Percentages (FMAP); States that spend less than 25% receive a 5% increase in FMAP. Iowa is currently spending approximately 56% on institutional costs vs. 44% on community based care. Structural Requirements of the BIP include three elements: 1) a No Wrong Door/Single Entry Point (NWD/SEP); 2) Conflict-Free Case Management; and 3) Core Standardized Assessment Instruments.

NWD/SEP
The NWD/SEP is defined as “a statewide system to enable consumer to access all long-term services and supports through an agency, organization, coordinated network, or portal, in accordance with such standards as the State shall establish and that shall provide information regarding the availability of such services, how to apply for such services, referral services for services and supports otherwise available in the community, and determinations of financial and functional eligibility for such services and supports, or assistance with assessment process for financial and functional eligibility.” The system aims to provide individuals with information on community LTSS, determine eligibility, and enroll eligible individuals in appropriate services. To be statewide, the system must include the following three components:

- A set of designated NWD/SEPs
- An informative website about community LTSS options in the state
- A statewide 1.800 number that connects individuals to the NWD/SEP or their partners

Guidance further states that the Medicaid Agency must be the NWD/SEP Oversight Agency, but the Medicaid Agency may delegate an Operating Agency.

Core Standardized Assessment (CSA)
The BIP Manual defines CSA as “development of core standardized assessment instruments for determining eligibility for non-institutionally-based long-term services and supports which shall be used in a uniform manner throughout the State, to determine a beneficiary’s needs for training, support services, medical care, transportation, and other services, and develop an individual service plan to address such needs.” The Manual further states that a state could meet this requirement by replacing all of its existing assessment instruments with a single instrument that would be used across all population settings. The state could use various assessments, but must ensure that their CSA capture certain required domains and topics which form the “core dataset.” The five core dataset includes: activities of daily living, instrumental activities of daily living; medical conditions/diagnosis; cognitive function and memory/learning; and behavior concerns.

Conflict-Free Case Management
The BIP Manual requires states to develop conflict-free case management services to “develop a service plan, arrange for services and supports, support the beneficiary (and, if appropriate the beneficiary’s caregivers) in directing the provision of services and supports for the beneficiary, and conduct ongoing monitoring to assure that services and supports are delivered to meet the beneficiary’s needs and achieve intended outcomes.” They define conflict of interest as a “real or seeming incompatibility between one’s private interests and one’s public fiduciary duties.” The Manual also provides characteristics of conflict-free case management as follows:

- There is separation of case management from direct service provision: Structurally or operationally, case managers should not be employees of any organization that provides direct services to the individuals. Ideally, conflict-free case management agencies are stand-alone and provide no other direct services. This prevents financial pressure for case managers to make referrals to their own organization or the “trading” of referrals.

- There is separation of eligibility determination from direct service provision: Eligibility for services is established separately from the provision of services, so assessors do not feel pressure to make individuals eligible to increase business for their organization. Eligibility is determined by an entity or organization that has no fiscal relationship to the individual.

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- Case managers do not establish funding levels for individuals: The case manager’s responsibility is to develop a plan of supports and services based on the individual’s assessed needs. The case manager cannot make decisions as to the amount of resources (individual budget, resource allocation, or amount of services).

- Individuals performing evaluations, assessments, and plans of care cannot be related by blood or marriage to the individual or any of the individual’s paid caregivers, financially responsible for the individual, or empowered to make financial or health-related decisions on behalf of the individual.

The manual does indicate that Centers for Medicaid and Medicare Services (CMS) is aware that in certain regions there may be only one provider available to serve as both the agent performing assessments and developing plans of care, and the provider of one or more community LTSS. To address this problem the state may permit a single provider to supply case management and direct support services, but will need to explain why no other providers are available and why no resource can be developed. In this instance, the state will be required to develop conflict of interest protections that mitigate possible conflicts. These could include assuring that individuals can advocate for themselves or have an advocate present in planning meetings, documenting that the individual has choice among all qualified providers of direct service among others. The manual does indicate that CMS is currently reviewing the options for conflict-free case management in a managed care environment and will provide updated guidance when it has been developed.

With all of the above being said, what this will all look like will ultimately be up to the plan that IME submits and negotiates with CMS as to what will be acceptable. To access the entire implementation manual for the BIP, you can go to http://aphsa.org/Home/doc/Balancing_Incentive_Program_Manual.pdf.

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that it was not. “Given the lack of evidence of the degree to which the steel lugs harm the County’s roads, the undisputed fact that other events cause road damage, and the undisputed fact that the County had tolerated steel lugs for many years before 2009, it is difficult to see that an outright ban on those lugs is necessary to serve a compelling state interest.” The Court then went on to note that the same objective could have been met in a less-restrictive manner, and referenced Howard County’s “arrangement with the Mennonite community to accept a financial deposit in a trust arrangement to cover possible road damage, in lieu of banning steel wheels.”

A final note on this case – Mitchell County has stated it will not appeal the decision to the United States Supreme Court. Moreover, in 2010 Mitchell County revised the ordinance at hand in this case: the ordinance now prohibits steel wheels on hard surface roads only if they cause damage, as opposed to a general ban.

About the Cover

The cover photo was taken by JD King, Fayette County Engineer, in the spring of 2006 on 130th Street south of Fayette of a grading project done by CJ Moyna & Sons, Inc. of Elkader. This was a regular farm-to-market funded construction project. One of the special features involved participation of the Fayette County Solid Waste Commission. The road was on the southern border of the county landfill, and they agreed to fund part of the excavation which was then stockpiled on their land for future use as cover material. That allowed for a less steep grade of the road - which produced “waste” dirt for the landfill. And while not only building a better roadway, the project also made for a great photo.

I’m always looking for interesting photos for the cover of the magazine and interesting feature stories, please contact me at rbicego@iowacounties.org.
Medicaid eClaims Process

Change is hard. Contrary to what some may say, change is hard. But as long as we are alive – and if you are reading this, trust me, you are – we have to embark on this journey of change. And one thing that is ever changing is transaction processing systems. In the health services sector, with a growing population and subsequent growing demands for services, so grows the demand for better and more efficient ways of processing these health service transactions. This is no different for the county community service offices around the state of Iowa who offer an invaluable service to the clients of their communities.

The effective and cool way to deal with this concern is to develop a technology system and then put a lowercase “e” on the front of the name. So that’s what we’ve done with the Medicaid “eClaims” process – the “e” standing for electronic, of course.

Next, the eClaim is created by simply typing the invoice number in a text box in CSN and clicking a button. This creates the eClaim populated with the appropriate claim information. The eClaim would then be checked over to ensure it is ready to import into the CSN claims processing module. At this point, the eClaim would be imported into CSN with a few clicks of the mouse and you have it – all 15 or 3,000 claims are brought into CSN and ready to move through the remainder of the regular claims process flow.

Now, this process is great, but not perfect. We are still working to make it better in various ways. However, to give you an idea of just how much mileage it has gotten, check out some stats: The number of DHS claims that are processed in CSN is astounding. From January 1, 2011 to December 31, 2011, there were 474,367 total claims processed in CSN. Of those claims, 351,746 were Medicaid claims imported through the eClaim process. That’s a whopping 74% of all the claims processed through CSN. And you can bet that 2012 will be much larger with the increasing number of counties that will pay claims in the system this year. In fact, we could see twice the number of claims processed in CSN and hence twice the number of claims coming into CSN via the eClaims process.

The most immediate advantage of this process is that counties can import and process their DHS claims in a fraction of the time it used to take. What used to take a county five to 10 business days can now be done in 30 to 60 minutes. Results vary, of course. And, surely there is a learning curve, but with training opportunities and a great CSN support team, the curve is manageable. Obviously since CSN saves time, it has the potential to save counties money with less hours doing data entry. Finally and perhaps the most important advantage of this process, is that it allows the wonderful people in the county social services offices to serve their clients more effectively by not being tied up entering claims manually.

As I said, the CSN team will continue to work on this process to make it better; meeting the demands of a growing transaction load as well as to improve the efficiencies. There are a couple of questions that need to be answered. First, how can we make the process more user friendly for a growing pool of county workers importing eClaims? Then, what can be done so that 500,000 – 600,000 claims can be imported through CSN without bogging the entire website down?

So, in other words, the journey of change continues…
ISAC would like to thank all of you who attended the 2012 ISAC Spring School of Instruction held on Thursday, March 15 and Friday, March 16. Over 700 county officials traveled to Des Moines for this year’s spring school at the Des Moines Marriott Downtown. It was great to have all the conference attendees under one roof this year!

Throughout the day on Thursday the exhibit hall featured three refreshments breaks that allowed members the opportunity to meet with various exhibitors about their products and services. Thank you to the 43 exhibitors that attended and supported the conference. An event of this scale would not be possible without the exhibitors. We also want to thank ISAC’s conference sponsors: Platinum Sponsor – County Risk Management Services, Inc. representing ICAP and IMWCA; Gold Sponsors – Cott Systems, Inc. and DEVNET, Inc.; Silver Sponsors – Cost Advisory Services, Inc., Election Systems & Software, and TrueNorth Companies.

The following sessions were offered at the Exhibitor Learning Center on Thursday morning: Connected Justice: Reducing the Rising Costs in Law Enforcement, Courts and Corrections by Cisco Systems, Inc.; TCPN- The Cooperative Purchasing Network by Matt Parrott/Storey Kenworthy; and Using GIS for Agricultural Land Assessment by The Schneider Corporation. In addition to the Exhibitor Learning Center presentations, ISAC hosted the following educational seminars: An HR Potpourri of Hot Topics: Search and Seizure, Hiring and Firing, Handbook and Policies, and Updates on Collective Bargaining by Mike Galloway, Ahlers & Cooney, P.C.; IPERS Overview by Marlene Hyde, IPERS Senior Benefits Counselor; and Iowa Citizens’ Aide/Ombudsman’s Office - The What, Why and How by Kristie Hirschman.

After a morning dedicated to education, the FY 2013 ISAC budget was approved by the membership during the ISAC Business Meeting and Awards Ceremony. The ISAC Scholarship Program awarded $3,000 scholarships to the following outstanding high school students: Trey Alessio, Lincoln High School in Polk County (District 1); Carissa Kelm, Clarksville High School in Bremer County (District 2); Amanda Kesterson, Denison High School in Crawford County (District 3); Amanda Steffes, Audubon High School in Audubon County (district 4); Jenny Kuenstling, Knoxville High School in Marion County (district 5); and Sean DeVries, Anamosa High in Jones County (district 6). Ethan Westering from Atlantic School in Cass County also received a $2,000 scholarship from the Iowa Counties Information Technology Organization, and Michaela Kennedy from Abraham Lincoln High School in Pottawattamie County received the past president’s scholarship in the amount of $3,000.

Scholarship eligibility is limited to children of county officials or county employees. ISAC scholarships are funded through the ISAC Education Foundation. Although not honored during the spring school, the following students received runner-up scholarships in the amount of $1,500: Jennifer Metzger, Nevada High School in Story County; Cole Schwartz, Forest City High School in Winnebago County; Connor Rowley, Spirit Lake High School in Dickinson County; Paige Kennon, Atlantic High School in Cass County; Tyler Folkeorts, Chariton High School in Lucas County; and McKinley Kuhlman, Davenport Central High School in Scott County.

Following an afternoon full of affiliate meetings, the ISAC Dance gave members the opportunity to socialize and enjoy music provided by Knight Life Productions. Morning refreshments were available to everyone on Friday morning. All day Friday was dedicated to the affiliate groups. All registered conference attendees enjoyed a box lunch provided by ISAC. This time was spent networking with county officials from other affiliates.

We look forward to seeing everyone at ISAC’s 2012 Fall School of Instruction being held November 28-30 at the Veterans Memorial Community Choice Credit Union Convention Center, which is located right off of I-235 in downtown Des Moines. Registration and conference hotel room blocks for the 2012 fall school will not open until late summer, so please do not make your reservations until conference details are announced this summer. We appreciate your assistance in this matter.

We greatly appreciated all the feedback that was given on our online post-conference survey. All feedback is taken into consideration when planning and making alterations to future conferences. Please contact me at shorner@iowacounties.org if you ever have any comments or suggestions regarding ISAC conferences and events.
ISAC meetings
President Wayne Walter called the meeting to order and led the board in the Pledge of Allegiance. Wayne Chizek, Darin Raymond and Joan McCalmant were then sworn in by President Walter.

The January 20, 2012 ISAC Board of Directors meeting minutes were reviewed and approved unanimously as written. The ETC/CSN Board of Directors meeting minutes from the same date were reviewed for informational purposes.

The February 8, 2012 ISAC Executive Committee meeting minutes were reviewed and approved unanimously.

The minutes were unanimously accepted into the permanent record.

Brad Holtan reviewed the financial report for January 31, 2012. He noted that after the spring school scholarships are awarded the Education Foundation balance will only be around $7,000. A list of all ISAC investments was included in the board materials. The board unanimously accepted the financial report.

Kristi Harshbarger reported to the board that the second declaratory order request has been submitted to the Department of Revenue.

Bill Peterson updated the board on the NACo Prescription Drug Card Program. He explained an opportunity for revenue sharing that exists with the new arrangement if a county or ISAC were to endorse the program. Iowa currently has 45 counties who participate in the program. Based on their current participation ISAC would generate around $18,000 annually to endorse the program. The board unanimously approved ISAC’s endorsement of the CVS Caremark Prescription Drug Card program.

Bill familiarized the board with a jail medical plan about which he had been approached. After lengthy discussion by the Board, the decision of whether or not to pursue the plan was deferred to the Iowa State Sheriffs’ and Deputies’ Association.


Stacy Horner discussed future meeting dates for the 2015 and 2016 ISAC Fall Schools of Instruction. They included the weeks of Labor Day, the last week in October, and the last week in November. After ample discussion the board deferred the discussion until the April meeting during which more affiliate representation will be in attendance.

Tammy Norman updated the board on the ISAC Scholarship Selection committee results and on the past president and ICIT scholarships.

Bill reviewed the ISAC budget process and highlighted the projections for the FY 2012 budget. He discussed the specific line items that would need to be adjusted and reported that the budget will net with ISAC spending about $93,000 less than had been budgeted. He continued to note the significant income and expense adjustments for the FY 2013 budget. The proposed budget included a dues increase of $24,750 ($250 per county) and significant losses of revenue from the IPAIT endorsement and low interest earnings. With revenue increases, the proposed FY 2013 budget expenses are projected to exceed revenues by $138,020. Rachel Bicego and Stacy Horner presented proposed changes to the 2013 vendor participations. The board discussed the dues increase and agreed that dues remain at a very low percentage of the core association revenue at around 20%. The budget proposes a 2% increase in staff salaries and a decrease in board meeting expenses. Following board discussion on many changes, the summary of proposed actions was reviewed.

President Walter recessed the board and reconvened the next morning.

The Board asked questions regarding the proposed vendor participation changes and the board meeting budget line item. The Board of Director’s Meetings line item was unanimously changed from $40,000 to $45,000.

The board discussed the dues increase history, and it was noted that there has been no dues increase since 2009. The board emphasized that there is no increase in registration fees. The FY 2013 budget proposal was approved unanimously as amended.
Mary Beth Mellick gave a presentation of the property tax reform bill, HF 2274. There was ample discussion regarding the breakdown of the changes in the bill. Hanna De Groot gave an update on raw milk, burial transit permits, guns, and election bills. Linda Hinton updated the board on the mental health reform bills. She also discussed the joint policy statement of the Iowa State Association of County Supervisors, Iowa County Community Services Association and ISAC. This statement was approved by the supervisor’s affiliate during their business meeting on February 9. The board unanimously adopted the joint policy statement as the ISAC position on mental health reform.

Rachel gave an overview of the ISAC activities that are planned for Iowans attending the NACo Legislative Conference in Washington, D.C. from March 3-7, 2012, and Bill reminded the board that the NACo Annual Conference and Exposition will be held in Allegheny County (Pittsburgh), Pennsylvania from July 13-17, 2012.

Grant Veedar reported that G. Riki Hokama, Maui County Council, was the lone individual to file his paper to run for NACo 2nd Vice President prior to the January 31, 2012 deadline.

President Walter distributed a document listing all of his ISAC Committee Appointments.

Harlan Hansen’s nomination as the ISAC Board representative on the County Case Management Services Board was unanimously approved.

Sarah Kaufman’s nomination as the ISAC Board representative on the County Rate Information Systems Board was unanimously approved.

The Board unanimously approved the nomination of Ben Rogers, Linn County Supervisor for the NACo County Leadership Institute.

Prior to adjournment the Board shared issues, concerns, ideas, achievements, etc. with other board members.

The Business Meeting and Awards Ceremony was called to order by President Wayne Walter.

President Walter introduced Peggy Weitl, Carroll County, who gave the invocation.

President Walter then led the membership in the Pledge of Allegiance.

President Walter introduced the head table and the remainder of the ISAC Board of Directors. He then introduced Bill Peterson.

Bill gave announcements and presented the FY 2013 ISAC Budget. Copies of the proposed budget were included in the conference registration packet. Bill gave an explanation of the budget process, a general overview of the FY 2013 budget that included a proposed dues increase of $250 per county, and opened up the floor for questions. Seeing no questions, President Walter called for action from the membership. The membership unanimously accepted the FY 2013 ISAC Budget.

Darin Raymond introduced Tammy Norman to present the 2012 ISAC scholarships. The Past President, ICIT and ISAC District scholarship winners were recognized and presented with a certificate by President Walter. Sean DeVries, the District 6 winner from Jones County, addressed the audience on behalf of all scholarship winners.

Tammy announced that this year’s Golf Scholarship Fundraiser will be held on August 23, 2012 at the Otter Creek Golf Course in Ankeny.

President Walter adjourned the meeting.
At 5:20 am, Friday, March 2, 2012 my cell phone rings. I don’t have to answer, I know who is calling. It is a message from Delta Airlines. Mr. Peterson, your 7:59 am flight to Washington, D.C. is now scheduled to depart from Des Moines at 12:00 pm. A few minutes later, an email pops up confirming the phone message. I call Kristi Harshbarger, get her voicemail, and leave a message about our flight. I follow that up with an email and our new itinerary. I grab my Elmore Leonard book, my phone and head for my reading chair. I soon fall back to sleep.

At 6:23 am, my cell phone rings. Delta Airlines calling again; this time to confirm that my 7:59 am flight is scheduled for an on-time departure from Des Moines. I call Kristi, get her voicemail, and leave a message that apparently Delta was just kidding earlier. We will be leaving at 7:59 am after all. I live 5 minutes from the airport but Kristi lives at least 28 minutes away. Kristi sends me a text that she got my message and is on the way to the airport – trying not to break any land speed records. Amazingly, Kristi and I both board the plane at 7:45 am – feeling slightly harried along with a slew of other aggrivated passengers who got the same set of messages. This trip to Washington didn’t seem to be off to a great start but it did get better.

I know Grant Veeder, Black Hawk County Auditor and Iowa’s NACo Board Representative, will report on the many highlights of the conference on the next page so I am going to focus on one of the presentations that I attended. The past several years, I have been fortunate to attend the NACo Technology Summit. This day-long pre-conference event is open to all NACo members at no extra charge. The Technology Summit is held in advance of both the NACo Legislative Conference in March and Annual Conference in July. It is organized by NACo Chief Information Officer Bert Jarreau. He does a great job! The purpose is to provide a forum for sharing information on information technology best practices and blends the experiences of both IT professionals and policy-makers.

This Summit’s theme was “the application of mobile, location-based and cloud-based technologies to better engage your citizens and employees.” The program was divided into four major presentations:

a. Leveraging mobile devices and mobile apps to improve government service delivery and productivity.
b. Improving government accountability and transparency through “Budgeting for Outcomes.”
c. Procurement concerns and challenges to leverage government procurement rules to obtain cloud-based solutions and services.
d. Analytics in local government.

I was particularly interested in the presentation titled “Improving Government Accountability and Transparency through Budgeting for Outcomes” because it was done by Linda Langston, NACo Second Vice President and Linn County Supervisor, and Dawn Jindrich, Linn County Budget Director. Linda did a nice job of explaining the characteristics of Linn County to the audience but it was Dawn who provided the meat of the presentation.

Dawn explained that Linn County had traditionally done incremental budgeting. This budgeting process uses the previous year as a base and makes incremental adjustment up or down to achieve a balanced budget. She began investigating other budgeting options in response to the various fiscal challenges Linn County was experiencing due to the effects of the 2008 floods. Dawn, after reviewing several options and gaining the support of the Linn County Board of Supervisors, settled on the process known as “budgeting for outcomes.” A process that is effective for entities that must address fiscal constraints because of limits on expenditures or significant decreases in revenues. It allows the entity to better focus on a productive use of revenues and funding programs that are most likely to achieve the entity’s strategic goals. Dawn explained their ability to use outcome based budgeting was facilitated because Linn County already had a strategic plan and had implemented performance measures previously.

Dawn described the eight steps commonly used in budgeting for outcomes:

a. Determine how much money is available.
b. Set high level priorities.
c. Allocate available money to priorities.
d. Determine what strategies will best achieve results.
e. Budget available dollars.
f. Set measures of progress.
g. Review what actually happened.
h. Communicate performance results.

Continues on page 17.
2012 NACo Legislative Conference Report

With a distinguished group of fellow county officials from Iowa I attended the annual NACo Legislative Conference in Washington, D.C. from March 3 to 7. I heard and saw many interesting things. I heard a Syrian protest rally on Connecticut Avenue. I saw an Iranian anti-war rally on Massachusetts Avenue. I saw a man standing on top of the White House.

I saw Linn County Supervisor and NACo Second Vice President Linda Langston in multiple places at once. Don’t ask me how she does that. Linda’s schedule now that she’s a part of NACo leadership has become taxing but I’d guess exhilarating too.

I heard conservative political analyst Tucker Carlson say that the Republicans’ biggest concern in the presidential election may be former New Mexico Governor Gary Johnson stealing Republican votes by running as a Libertarian, because he thinks Ron Paul will give Johnson his fundraising network. I heard liberal political analyst Eleanor Clift bet Carlson $10,000 that Paul wouldn’t do it.

Carlson and Clift were among the general session speakers at the conference, who also included Representatives Kay Granger (R-Texas), Adrian Smith (R-Nebraska), and Nancy Pelosi (D-California); Senators Dick Durbin (D-Illinois) and Mike Enzi (R-Wyoming); and Cabinet secretaries Ray LaHood (Transportation) and Tom Vilsack (Agriculture). Representative Pelosi plugged her effort to fight the Supreme Court’s “Citizens United” decision, which says huge super-PAC spending in elections is protected as free speech under the First Amendment. Fearing that the United States will become a plutocracy (you can look it up too), Pelosi wants first to pass a law that requires disclosure of donors, and then to amend the Constitution to specifically allow state and federal laws, like those overturned by the decision, that require campaign spending limits.

Our old buddy Secretary Vilsack dismissed assertions that uncertain times should hold government back from enacting needed reforms and programs, noting that Congress and the Lincoln administration approved the Department of Agriculture, land grant colleges, the Homestead Act and the transcontinental railroad, all in the middle of the Civil War. (Vilsack met with some of us Iowans after his speech, and wasn’t amused when I suggested that it’s easier to pass legislation when dissenting states have seceded from the Union.)

Some of the most interesting things we heard came from our visits with Iowa’s Congressmen and Senators and their staffs. One of the major issues that we quizzed all of them about was the precarious state of Medicare and Medicaid funding. Pointing out that 10,000 baby boomers a day are going on Medicare, Congressman Steve King said that the budget will come back into balance when we start losing 10,000 baby boomers a day. Chuck Grassley’s sharp-as-a-tack Health Policy Director, Rodney Whitlock, said that Medicare and Medicaid are due for “compression.” We were all impressed with this classy euphemism for “cuts.” He used some more Beltway code when he acknowledged that at some point Congress “has to do something on the revenue side,” i.e. collect more taxes.

Senator Grassley himself shared a candid observation when he told us that there is now significant support for another long-time NACo priority, taxing internet sales just like main street business sales. Since most Republicans have signed conservative lobbyist Grover Norquist’s pledge to not raise taxes, Grassley says this switch can only mean that Norquist has decreed that taxing internet sales is no longer to be considered a tax increase. (Grassley, incidentally, has not signed the pledge.)

At a meeting of the Elections Subcommittee of the Finance and Intergovernmental Affairs Steering committee, I heard about the future of voter registration. The Pew Center on the States did a study that focused on online registration in Arizona and Washington. In both of those states you may register to vote online if you have a current state driver’s license or identification card – you just transfer that online information into your voter record. No original signature is required because your driver’s license signature is considered sufficient. John Lindback of the Pew Center (he spoke to Iowa county auditors in November, 2010) says this reduces errors, saves time, money, and paper, and keeps up better with constantly moving voters.

Continues on next page.
A certain percentage of the available resources are withheld and departments are allowed to bid for those resources for projects. These project bids are called offers. Offers must meet the following criteria:

a. Be linked to one of the county’s strategic priorities.
b. Describe and justify the activity.
c. Identify two or three performance measures.
d. Describe the needed resources, whether FTEs or dollars.
e. Include collaborations or partnerships.
f. Describe consequences of not funding the offer.

The final budgeting decisions are then tied to the county’s priorities and the various offers are ranked individually by the board of supervisors. Those receiving the highest ranking are funded with the available resources.

Successful budgeting for outcomes requires knowing your county’s priorities, understanding of your available resources, and having a method in place for measuring the performance outcomes. Additionally, county department heads and employees should be thoroughly trained in this new process. I have no doubt skipped over some important points regarding this budgeting process, so I have invited Dawn to do a presentation at a future ISAC conference on this topic. Linda and she did a great job of representing Linn County and Iowa during this session.

The Technology Summit is a great way to start off the educational part of the conference but there was much more to come. Please read Grant’s report to learn about some of those activities. ISAC staff and county officials attending the conference were able to participate in many valuable educational sessions; speak directly with Secretary of Agriculture Tom Vilsack; visit with all seven members of Iowa’s Congressional delegation; and interact with county officials from around the country. When Kristi and I boarded the 7:00 pm flight back to Des Moines on Wednesday, March 7, we were ready to get home. Fortunately, our flight was on time and we arrived home safely, with our luggage intact.
How many times have you heard how important it is to invest in yourself and to stay current in one’s field? Or, that the quality of the workforce is a key to the success of any organization? For those involved in government finance, these statements have never been truer. Budget pressures, public scrutiny, and demands of elected officials require better leadership, more knowledge and new skills.

The Great Plains GFOA is a chapter of the Government Finance Officers Association, which is an international organization with a mission “to enhance and promote the professional management of governments for the public benefit by identifying and developing financial policies and best practices and promoting their use through education, training, facilitation of member networking, and leadership.”

The Great Plains GFOA was incorporated in the fall of 2009 in response to a perceived need for a regional/state/local chapter of the GFOA for government finance professionals in the area. The name purposely avoids referring to any one state, because the goal is to encourage interaction among finance professionals from a wide range of jurisdictions. Drawing members and participants from a larger geographic base also increases the potential for economies of scale that will provide more resources for high quality educational events. Reflecting its broad membership, the governing board of the Great Plains GFOA is composed of local and state officials from two different states.

Since its formation, the Great Plains GFOA has held four semi-annual conferences. Topics have covered a full range of financial and management issues confronting state and local governments. Every conference has qualified for continuing professional education (CPE) credits for those in the accounting profession.

Conference dates for 2012 are May 10 and 11 and October 4 and 5. Both conferences will be held at the College for Public Affairs and Community Service on the campus of the University of Nebraska at Omaha. The conference in May will include sessions on accounting, auditing, ethics, GASB 61, GFOA Best Practice on the Role of the Public Finance Officer in Sustainability, Popular Financial Reports, Public Pension Funding, IT Security, Tax Increment Financing and more. Speakers will include:

- John Miri (Center for Digital Government) will discuss ways of using technology and the web to make government more cost effective, transparent, and collaborative;
- Bob Eichem (CFO for the City of Boulder) will discuss GFOA Best Practice on the Role of Finance Officers in Sustainability;
- Beverly Kracher (Ph.D., Executive Director and President, Business Ethics Alliance) will discuss creating and enhancing an ethics program in an organization.

Participants in past conferences have been very positive in their evaluations: “I have attended several conferences sponsored by the Great Plains GFOA. These conferences provide excellent networking opportunities and outstanding learning environments, at an affordable price, on a variety of contemporary topics for government accounting and finance professionals.” (Joni Davis, Manager – Financial Accounting and Reporting, Omaha Public Power District)

Further information about the Great Plains GFOA is available at: http://www.gpgfoa.org/

See ad on page 23.
Correctional budgets are tight and training may end up at the bottom of your priorities list. When you consider the expenses that go into attending a training seminar per attendee, such as registration fees, gas, food, lodging expenses, and payroll costs for covering missed shifts, you may think you can’t afford training, but having an untrained staff is hardly the solution. In fact, inadequate, infrequent, and undocumented staff training increases your lawsuit risk and will end up costing you much more than providing proper training.

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Altogether, ADVANCED Training offers national and state seminar training or live and video training instruction opportunities. ADVANCED Training can help you reach your training goals on any budget.

While nothing replaces the benefits of live seminars, many facilities are turning to videos and on-line options to cost effectively supplement their training programs. Video training offers limitless flexibility. You are able to train staff members when you want, as many times as you want, including those who are newly hired or need a refresher, and you save hundreds of dollars in the process while lowering your risk of successful lawsuits. Did you know for best learning retention it is recommended to repeat the lesson in eight and 30 days?

ADVANCED Training offers a number of educational videos. Topics are focused on improving operations and efficiency, along with maintaining quality of care and reducing liability. Instruction is intended to improve observational skills, acknowledge reasonable outcomes, and provide increased understanding of medical and mental health procedures and issues within the correctional setting. Videos include course instruction, course outlines, pre- and post-tests with answer keys, and training guides. Certificates are provided for educational credit approval.
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## 2012 Calendar

### April 2012
- **10** CCMS Administrators Meeting  
  (Stoney Creek Inn, Johnston)
- **17-18** Environmental Health Conference  
  (Ames)
- **19** ISAC Board of Directors Meeting  
  (ISAC Office, West Des Moines)

### May 2012
- **3** CCMS Advanced Case Management  
  (Hilton Garden Inn, Johnston)
- **15-18** Treasurer’s Annual Conference  
  (Davenport)

### June 2012
- **7** CCMS Supervisors Training  
  (Stoney Creek Inn, Johnston)
- **10-14** County Attorneys Spring Training Conference  
  (Okoboji)
- **13-15** ICIT Annual Conference  
  (West Des Moines Marriott)
- **20-21** CCMS Fundamentals Training  
  (Courtyard by Marriott, Ankeny)
- **28** ISAC Board of Directors Meeting  
  (ISAC Office, West Des Moines)

### July 2012
- **10** CCMS Administrators Meeting  
  (Hilton Garden Inn, Johnston)
- **13-17** NACo Annual Conference  
  (Pittsburgh, PA)
- **24-27** Auditors Annual Conference  
  (Harrah’s, Council Bluffs)
- **26-27** Supervisors Executive Board Retreat  
  (Holiday Inn Express, Sioux Center)

### August 2012
- **8-10** CCMS Annual Conference  
  (Embassy Suites on the River, Des Moines)
- **8-10** Recorders Annual Conference  
  (Arrowood Resort, Okoboji)
- **23** ISAC Scholarship Golf Fundraiser  
  (Otter Creek Golf Course, Ankeny)

### September 2012
- **13-14** ISAC Board of Directors Retreat  
  (Hotel Winneshiek, Decorah)
- **30-3** Assessors Annual Conference  
  (Holiday Inn Airport, Des Moines)

### October 2012
- **17-18** CCMS Fundamentals Training  
  (Courtyard by Marriott, Ankeny)
- **23** CCMS Administrators Meeting  
  (Stoney Creek Inn, Johnston)
- **25-26** ISAC Board of Directors Meeting  
  (ISAC Office, West Des Moines)

### November 2012
- **1** CCMS Advanced Case Management  
  (Hilton Garden Inn, Johnston)
- **11-14** County Attorneys Fall Training Conference  
  (Dubuque)
- **28-30** ISAC Fall School of Instruction  
  (Iowa Events Center, Des Moines)

### December 2012
- **4-6** Engineers Statewide Annual Conference  
  (Ames)
- **13** ISAC Board of Directors Meeting  
  (ISAC Office, West Des Moines)

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Please visit ISAC’s online calendar of events at [www.iowacounties.org](http://www.iowacounties.org) and click on ‘Upcoming Events.’ A listing of all the meetings scheduled for 2012, agendas and meeting notices can be found on ISAC’s website. A majority of ISAC’s meetings offer online registration. If you have any questions about the meetings listed above or would like to add an affiliate meeting to the ISAC Calendar, please contact Stacy Horner at 515.244.7181 or shorner@iowacounties.org.
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