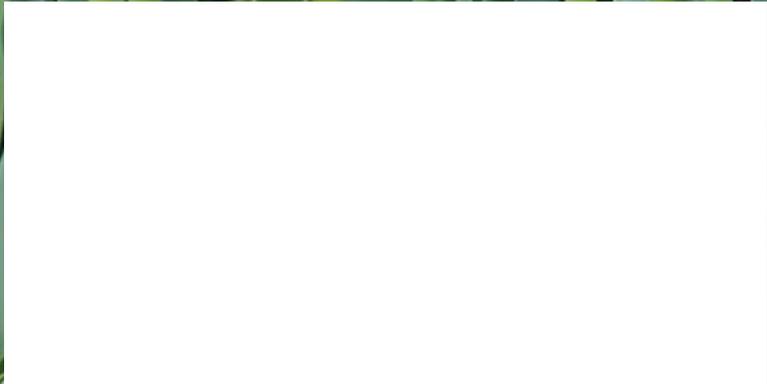




# The Iowa County

August 2016

ISAC Scholarship Application  
County Employee Lobbying  
Voting Videos





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# The Iowa County

August 2016 \* Volume 45, Number 8

The Iowa County: The official magazine of the Iowa State Association of Counties  
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Rachel Bennett, EDITOR

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## About the Cover

The cover shows a portion of the Sioux County Courthouse tulip bed this spring. This photo and another of the full Courthouse that can be seen on the ISAC Facebook page were taken by Suzanne Haverdink, Sioux County Zoning Assistant. Beautiful photos - thank you for sharing them with us!



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## ISAC OFFICERS

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Peggy Rice - Humboldt County Auditor

### 2ND VICE PRESIDENT

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### 3RD VICE PRESIDENT

Eric Stierman - Dubuque County Treasurer

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Joe Neary - Palo Alto County Environmental Health

Joel Rohne - Worth County IT

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Cara Marker-Morgan - Fremont County Supervisor

Elizabeth Ledvina - Tama County Veterans Affairs

Tim Huey - Scott County Zoning

Melvyn Houser - Pottawattamie County Supervisor

(Past President and NACo Board Representative)

Darin Raymond - Plymouth County Attorney (Past President)

Grant Veeder - Black Hawk County Auditor (NACo Board)

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Lucas Beenken - Public Policy Specialist

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Kristin Comstock - Financial Administrative Assistant

Katie Cook - Administrative Assistant/Receptionist

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Kristi Harshbarger - General Counsel

Robin Harlow - Innovation and Research Manager

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Tammy Norman - Office Manager

Laz Schreck - Project Manager/Data Analyst

Chris Schwebach - Software Developer

Jeanine Scott - Information Technology Manager

Kelsey Sebern - Meeting/Event Administrator

Molly Steffen - CM&MHDS Specialist

Gina Wernimont - Administrative Analyst

Dylan Young - Senior Software Developer

\*\* The views and opinions expressed in articles authored by anyone other than ISAC staff are those of the authors and do not necessarily reflect the official policy or position of ISAC.

### 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.

# Legal Briefs

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**Kristi Harshbarger**

General Counsel

[kharshbarger@iowacounties.org](mailto:kharshbarger@iowacounties.org)

---

## County Employee Lobbying

I recently received and researched the answer to a question that I thought many of our members might benefit from reading the answer. If you are a county employee (not an elected official) that interacts with members of the Iowa Legislature, do you know when you are required to register as a lobbyist under Iowa law?

### Definition of Lobbyist

There are four types of activities that classify a person as a lobbyist under Iowa Code §68B.2(13)(a) and two of those could apply to county employees. First, if you are “a designated representative of an organization which has as one of its purposes the encouragement of the passage, defeat, approval, veto, or modification of legislation, a rule, or an executive order before the general assembly, a state agency or any statewide elected official” then you are a lobbyist. ISAC would likely be considered this type of organization, as well as any of the organizations that are affiliates of ISAC. There is, however, a specific exemption that might apply to lobbying on an ISAC or

affiliate organization initiative and will be discussed below.

Second, if you represent “the position of a federal, state, or local government agency, in which [you] serve or [are] employed as the designated representative, for purposes of encouraging the passage, defeat, approval, veto or modification of legislation, a rule, or an executive order by members of the general assembly, a state agency, or any statewide elected official” then you are a lobbyist. This part of the definition could be tricky for county employees lobbying on a bill that matters to their county. Arguably, county employees wouldn’t typically be the designated representative of the county for lobbying purposes, unless there has been some kind of action taken designating the county employee as such. However, the only guidance we have on this topic are the Attorney General Opinion and Iowa Ethics and Campaign Disclosure Board Advisory Opinion discussed below. The scenarios dealt with in each of these opinions involved elected county officials (county attorney and treasurer), as opposed to a county employee. Elected officials have an exemption from the definition of lobbyist that applies specifically to them, and not county employees. Excluded from the definition of lobbyist is “[a]ll federal, state, and local elected officials, while performing the duties and responsibilities of office.” Iowa Code §68B.2(13)(b)(3) (emphasis added). Therefore, a lot of the analysis we have to rely on for this topic focuses on whether lobbying on a particular bill relates to an elected official’s duties and responsibilities of office. Because that exemption does not apply to county employees, it becomes more of a grey area as to whether lobbyist registration is necessary.

There is one exclusion to the definition of lobbyist that likely applies to a majority of the members of ISAC and (members of organizations that are affiliates of ISAC) when lobbying. Iowa Code §68B.2(13)(b)(7) states a lobbyist does not mean “[a]n individual who is a member, director, trustee, officer, or committee member of a business, trade, labor, farm, professional, religious, education, or charitable association, foundation, or organization who either is not paid compensation or is not specifically designated.” Both ISAC and the organizations that are affiliates of ISAC would likely be considered professional or charitable associations. See Iowa Ethics and Campaign Disclosure Board Advisory Opinion, 2002-07 (determined that the Iowa Treasurer’s Association was a professional association for purposes of the definition of lobbyist) and Iowa Attorney General Opinion 1197 WL 458658 (determining that the Iowa County Attorneys Association and ISAC were likely professional associations for purposes of the definition of lobbyist).

### Are you the Designated Representative of ISAC or an Affiliate Organization of ISAC?

This is the most difficult part of the analysis for two reasons. One, because both the Attorney General’s office and the Iowa Ethics and Campaign Disclosure Board have stated that the idea of designated representative should be interpreted broadly. See Iowa Attorney General Opinion 1197 WL 458658 (stating that the professional association need not “take any formal action specifically designating...one of its representatives” for lobbying purposes) and Iowa Ethics and Campaign Disclosure Board Advisory Opinion, 2002-07 (stating “[t]he Board does interpret the term ‘designate’ broadly in order to prevent individuals from avoiding public disclosure of lobbying activities by acting on ‘behalf’ of an association but not being ‘formally designated.’”).

# Legal Briefs

Second, the determination of whether someone has been designated or is acting on behalf of their affiliate organization would be a very fact-specific determination that could change over time. Neither the Iowa Attorney General Opinion or the Iowa Ethics and Campaign Disclosure Board Advisory Opinion discussed above reached conclusions as to whether the elected county official was a designated representative of their affiliate association or ISAC. Megan Tooker, Executive Director with the Iowa Ethics and Campaign Disclosure Board described her interpretation of the distinction this way: "I think the key to whether someone is 'designated' is whether the person is authorized to speak on behalf of the entity. If I'm a member of Ducks Unlimited and I tell my legislator 'I'm a hunter and a member of Ducks Unlimited and I think you should vote in favor of SF127 because . . . .' the individual does not need to register. If, however, a member of Ducks Unlimited tells a legislator or executive branch official 'On behalf of Ducks Unlimited and its members, I'm asking you to vote in favor of SF127 because . . . .' then that individual needs to register." Email from M. Tooker to K. Harshbarger dated June 29, 2016.

As you can see from this example, it may be important for county employees to be aware of the proper language to use so as to make it clear that they are speaking as a member of ISAC or an affiliate organization of ISAC, but are not authorized to speak on behalf of the entire association. For the standard member of ISAC or an affiliated organization of ISAC, the risk is very low that they will be considered the designated representative of the organization for lobbying purposes. It would be unmanageable for every member of every organization that lobbies before the Iowa Legislature to register as a lobbyist. Having information on this issue and the rules governing lobbying, however, can help avoid any potential misunderstanding.

County employees that are designated as the legislative liaison for organizations that are affiliates of ISAC should likely register as lobbyists. If they choose not to do so, they should consider how they would prove they were not the organization's designated representatives for lobbying (for example the use of paid lobbyists for the organization and considering an explicit prohibition for the legislative liaisons to speak on behalf of all of the organization). Because there is no penalty for unnecessarily registering as a lobbyist, my recommendation would be that the organization's legislative liaisons register as lobbyists. The minor hassle created by registering would be outweighed by the benefit of allowing the legislative liaisons of the organization freedom to lobby as necessary without the risk of violating the law.

## Conclusion

In conclusion, here is a summary of my advice on whether lobbyist registration is required for county employees in the following scenarios:

- Legislative Liaison for an affiliate organization of ISAC? Register.
- Board of Supervisors gives you authority to be the county representative on a particular bill/issue or legislative matters that impact your department? Register.
- Any other members of ISAC/ISAC's affiliate organizations? Have a basic grasp of the rules governing lobbying and lobbyist registration. Understand that you can speak to legislators about bills and provide your opinion as a member of ISAC and your affiliate organization, but you do not have authority to speak on behalf of the entire organization. Registration not necessary.

Remember, if you are an elected official, you do not need to register if your lobbying activities are within the scope of your office's duties and responsibilities. That analysis, however, could take up an entire additional magazine article, so I will save that for another day. When in doubt, feel free to contact me, Megan Tooker with the Iowa Ethics and Campaign Disclosure Board, and/or your county attorney.



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# Communications



## Rachel Bennett

ISAC Communications and Marketing Manager  
[rbennett@iowacounties.org](mailto:rbennett@iowacounties.org)

- Informing about county government
- Informing about the role of the county auditor as the commissioner of elections
- Breaking down the walls of people who haven't voted or haven't voted in a long time

In order to get all of this important information across to a vast and varied target audience we knew that we had to make the subject matter light, brief and watchable. We did so by adding humor while still offering the utmost respect to the process, to the office of auditor and its role as election administrators, and also to the military.

We will be asking all ISAC members to share these videos far and wide over the next couple of months and leading up to the General Election in November. Post them on your county's website and social media sites and on your personal sites as well. Share them with your legislators, schools, community service organizations, and your local media. We need your help to push the message, and we will provide you with templates to do so along the way.

This was an extremely complex project that couldn't have been done without help from a large group of people. Several thank yous are definitely in order. The whole project was given amazing direction by the brainstorming committee of auditors - Grant Veeder, Sandy Hysell, Marcia Carter, Jessica Lara, Marge Pitts, Peggy Rice, Eric VanLancker, and Travis Weipert. The ISAC Board of Directors and the ISACA Executive Committee committed funding to this project. The Secretary of State's office, specifically, Secretary Pate, Carol Olson, Dawn Williams, Michael Ross, and many other staff members were instrumental in providing feedback and oversight as well as allowing us to film in their office. Many thank yous also go to the Octagon Center for the Arts in Ames, the Department of Administrative Services, the State Law Library, Matt Parrott, ElectionSource, Henry M. Adkins and Sons, the Iowa National Guard, the Iowa State University Army ROTC, and many other auditors and individuals who dedicated their time, props, space, ideas, talents, etc. to the project. Lastly, a special thanks to the team at Laser Resources, Inc. who produced these videos including director Jack Meggers and videographer Loren Eckhart, and to actor and comedian Tim Schifsky.

## ISAC Voting Videos Released

Over the past couple of years ISAC has begun to add videos to its communications arsenal. A series of legislative priorities videos and the We Are ISAC video were our first attempts. In brainstorming ideas internally as to what would offer the maximum amount of benefit to our members, we decided to move forward with the creation of videos about auditors in their role as commissioners of elections.

We are excited to unveil three videos that are now available on our Iowa Counties YouTube channel entitled 1. Registering to Vote, 2. Voting Absentee, and 3. Voting on Election Day. We hope that you enjoy them and find them useful!

Work began in October of 2015 with a brainstorming committee of many auditors from across the state and ISAC staff. Using the feedback from that meeting, the project grew into a series of three videos that meet the original goals of the committee which include:

- Increasing voters
- Educating voters
- Eliminating fear and intimidation

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## ISAC Board of Directors Meeting Summary - July 7, 2016

President Joan McCalmant called the meeting to order and led the Board in the Pledge of Allegiance. The April 29 ISAC Board of Directors, June 8 ISAC Articles and Bylaws Committee, and June 10 ISAC Executive Committee minutes were accepted unanimously.

Wendy Moran and Nicole Loux, McGowen, Hurst, Clark & Smith, P.C., discussed issues related to the FY 2016 audit. ISAC staff members were dismissed giving board member the opportunity to raise issues of concern. Staff returned, and the ISAC Board recessed and reconvened following adjournment of the Iowa Counties Technology Services (ICTS) Board meeting.

Robin Harlow, ISAC Innovation and Research Manager, gave a brief history of the County Strategic Technology Advisory Resource (CoSTAR), and introduced Eric Guth, Winnebago County IT Director, who gave an overview of the core values and goals contained in the CoSTAR strategic plan that was recently created. The development of an action plan that includes long-term funding mechanisms will be the next step.

Brad Holtan, ISAC Finance and Administration Manager, gave the financial report as of May 31, 2016 that included a review of the investments in graph form. The financial report was accepted unanimously.

Bill Peterson, ISAC Executive Director, gave a brief history of the Drug and Alcohol Testing Alliance, LLC (DATA, LLC) and the decision to turn the program over to St. Luke Health Resources. Upon disincorporation the money will be distributed to the three participating entities – ISAC, the Iowa League of Cities, and the Iowa Association of Municipal Utilities. ISAC will begin an annual marketing agreement with St. Luke. The Board voted to unanimously dissolve DATA, LLC.

Kristi Harshbarger, ISAC General Counsel, reported that a final agreement has been reached and approved by the ISAC Executive Committee with the Iowa County Attorneys Case Management Project. The contract was unanimously ratified.

Beth Manley, ISAC Compliance Officer, gave an overview of the 2015-2016 HIPAA Program that included the financials, and Kristi gave an update on legal matters. Kristi and Jeanine Scott, ISAC Information Technology Manager, reported that discussions are taking place between ISAC and the Iowa Precinct Atlas Committee for ISAC to take over support of the Precinct Atlas system.

Kristi reviewed the suggested redline changes to the articles and bylaws related to changes to the 2017 ISAC policy process in response to the Fall School dates being moved from November to August. She described the requirements and the process for updating the bylaws and articles. A sample marketing piece was included with a timeline for the new process. The recommended changes were unanimously approved and the Resolution to Amend the Legislative Priority Setting Process was unanimously adopted.

Melvyn Houser reported on the National Association of Counties (NACo) Board of Directors meeting that was held in conjunction with the Western Interstate Region Conference in Teton County, Wyoming. Rachel Bennett, ISAC Communications and Marketing Manager, reviewed the schedule of Iowa events during the NACo Annual Conference being held in Los Angeles County, California.

Tammy Norman was honored by the Board and staff for 20 years of services to ISAC.

Jamie Cashman and Lucas Beenken gave an overview and timeline of the policy process for the 2017 session. They gave insight to issues that are likely to affect counties during the upcoming session and an outlook on the 2016 General Election.

Rachel gave an introduction and showed the three voting videos to the Board that were discussed on page 6.

Brad reported low registration numbers for the Leadership Trainings held in May and June. Staff will be looking into options for future trainings. He also gave an update on sponsors and golfers for the ISAC Scholarship Golf Fundraiser being held on August 31 at Toad Valley Golf Course in Pleasant Hill. President McCalmant and Kelsey Sebern gave an overview of the ISAC Board of Directors retreat agenda. Bill discussed the agenda and questionnaire for the Planning Session that will be held during the retreat. Kelsey gave an update on the 2016 ISAC Fall School of Instruction. Rachel reported that Trivia Night will again be held during the conference to raise money for ISAC scholarships – see more on pages 8-10. Andrea Jansen and Robin Harlow reported that the 2017 Smart Connections Conference will be joining with the ICTS Advisory Committee Conference to make for a joint, two-day conference that will cover general technology subjects for non-technical county officials and employees. A track for IT professionals will continue to be offered on the second day.

President McCalmant adjourned the meeting following board members sharing issues, concerns, ideas achievements, etc. with other board members.

# Meetings

## Registration for the Fall School to Open Soon!

ISAC will host the 2016 ISAC Fall School of Instruction on November 30 - December 2 at the Veterans Memorial Community Choice Credit Union Convention Center in Des Moines. The convention center is located right off of I-235 in downtown Des Moines at 833 Fifth Street.

Online conference registration and hotel rooms through online housing will open at 8:30 am on Wednesday, August 17. Remember that ISAC has built and will be using a new meeting registration system for both ISAC members and vendors. Please make sure to register for a username and password in advance. For instructions on how to set up a profile, please view this tutorial: <http://www.iowacounties.org/wp-content/uploads/2016/05/Event-Management-System-Tutorial-Affiliate-Meeting-Presentation.pdf>.

Like in years past, you must register for the conference on the ISAC website before you are able to reserve your hotel room through online housing. Advanced conference registration closes at 4:30 pm on Friday, November 11; however, the ISAC hotel room blocks will only be available until 4:30 pm on Friday, October 28. After this date, the ISAC conference room blocks will be closed and the special conference rates will be unavailable. Please make note of all ISAC and hotel cancellation policies when reserving your hotel room. We strongly encourage you to pre-register for the conference. It greatly helps the ISAC staff to plan accordingly for meals and materials and keeps the conference registration rates as low as possible, which in turn saves money for your county.

## Conference Registration Fees

ISAC members:

- Advanced registration fee - \$200 (October 28, 4:30 pm pre-registration deadline)
- At-the-door registration fee - \$230
- Additional family/spouse lunch ticket - \$50

ISAC non-members:

- Advanced registration fee - \$600 (October 28, 4:30 pm pre-registration deadline)
- At-the-door registration fee - \$690

## Conference Hotels

- Des Moines Marriott Downtown (conference headquarters hotel) - 700 Grand Avenue
- Embassy Suites Des Moines Downtown - 101 East Locust Street
- Holiday Inn Downtown - 1050 6th Avenue
- Hampton Inn & Suites Des Moines Downtown- 120 SW Water Street
- Residence Inn Des Moines Downtown – 100 SW Water Street

Please do not call the ISAC conference hotels to book your hotel accommodations. ISAC conference rates will not apply if you call and reserve a room or reserve a room on a hotel website. You must go through the online housing website after registering for the conference to receive the ISAC conference rate. After registering for a hotel room through the Meetingmax Online Housing System, you will receive an acknowledgement email immediately from the Des Moines Housing Bureau. The acknowledgement email will contain your hotel location, room type/rate, arrival/departure date, credit card information, and a change request link. This hotel reservation acknowledgement confirms your sleeping room for the conference. Within a week of registering for a hotel room, the hotel (that you selected and that is listed on your acknowledgement email) will send you a hotel confirmation number. Both the acknowledgement and confirmation emails will contain a change request link in case you should need to make a change to your reservation prior to November 22. If you need to cancel your reservation, please contact me at 515.244.7181 so that your room can go to an ISAC member on the waiting list.



**Kelsey Sebern**

Meeting/Event Administrator  
[ksebern@iowacounties.org](mailto:ksebern@iowacounties.org)

## \*\*\*UPDATED Spring School Dates

Due to St. Patrick's Day being celebrated on our previously scheduled Spring School dates, we are rescheduling our 2017 Spring School of Instruction to the week prior, March 9-10, 2017. County Day at the Capitol will be on Wednesday, March 8, 2017.

You may only reserve one hotel room per conference registration. This is a first come, first served registration system and the name on the reservation must match the name of the conference registration. You are more than welcome to share a double room with another conference attendee. Please have only one of the two individuals who want to share a room request a double room through online housing website. If you are registering more than one individual in your county, you will need to register and make each hotel reservation individually, but may use the same credit card.

## Conference Parking

If you don't choose to park at your hotel and utilize the complimentary hotel shuttle services, parking is available for \$8/day north of the convention center with entrances off Third and Fifth Streets as well as Crocker Street. These parking lots offer the closest and most convenient access to the convention center with easy access to I-235. ADA Accessible parking is available at the Iowa Events Center by entering the lot south of Crocker Street, next to Community Choice Credit Union Convention Center. Please have cash payment available. For directions and more detailed parking information, please visit <http://www.iowaeventscenter.com/plan-your-visit/directions-parking>.

\*\*\*Due to the construction of a new, 330-room convention center hotel south of the Iowa Events Center, a portion of the skywalk between Watson Powell Jr. Way and the Iowa Events Center is closed. This will redirect skywalk traffic down to street level in order to access the Iowa Events Center from the south. Signage is available to help direct traffic to the Iowa Events Center. To access the skywalk map, please visit [http://iowaeventscenter.staging.carbonhouse.com/assets/doc/Downtown-Des-Moines-Navigation-Map\\_2015-2016-425164ef91.pdf](http://iowaeventscenter.staging.carbonhouse.com/assets/doc/Downtown-Des-Moines-Navigation-Map_2015-2016-425164ef91.pdf).

## Trivia Night

Trivia Night will be an excellent opportunity to not only support ISAC scholarships, but also to have a great time competing with and against your fellow county officials and exhibitors on Wednesday evening. Tables will be available for purchase with all proceeds going to the ISAC Education Foundation that supports scholarships given to the children of Iowa county officials and employees. Registration includes refreshments and the opportunity to win door prizes and an \$800 cash prize. A registration form is on the next page.

## Children's Cancer Connection Community Service Project

We are looking for donations to this great program that helps oncology/hematology patients of any age get through the most difficult tasks in their treatments by giving them something to work towards. Each affiliate will be competing as a team to see how many items and/or cash they can donate. Each \$2 will count as one item. The winning affiliate will receive a free refreshment break during the Spring School. Requested donations would ideally fit in a shoe box and include the following items: Finger nail polish; bubbles; Hot Wheels/Matchbox cars; Blind bags (in all varieties - kids love these!); Play Dough; costume jewelry (must be new!); squishy balls (not bouncy balls that become a choking hazard); Singular lego packets (VERY POPULAR); baby items for under 12 months (bibs, wipes, washcloths, toys, etc.); and \$5 gift cards (Target, Wal-Mart, etc.). \*\*\*Please avoid Dollar Store/Tree items, all cloth items, and board games. More information about [www.childrenscancerconnection.org/](http://www.childrenscancerconnection.org/).

## Conference Attire

Conference attire is business dress for Wednesday and Thursday. Please feel free to dress casually on Friday. Remember that meeting room temperatures do not feel the same to everyone. You may want to bring a sweater or jacket should the meeting room temperature be too cool for you.

## ISAC Conference Website

Please bookmark the fall school webpage <http://www.iowacounties.org/meetings-and-events/fall-school-of-instruction/>. It is updated often with the latest conference information you will need to prepare for the conference, including: hotel reservation instructions; conference agendas; exhibit hall information; parking maps and updates. As always, please contact me at [ksebern@iowacounties.org](mailto:ksebern@iowacounties.org) if you have any questions. We look forward to seeing you in November!

## Teamwork Makes Dreams Work CM&MHDS Annual Conference

Don't miss the 2016 CM&MHDS Annual Conference being held September 13-14 at the West Des Moines Sheraton. A detailed conference agenda is on the next page.



**ISAC Education Foundation Trivia Night brought to you by Election Systems & Software**

**Wednesday, November 30**

**7:30 pm – 10:00 pm**

**Des Moines Marriott Downtown**



ISAC will host its second annual Trivia Night to raise money to support the ISAC Education Foundation that provides scholarships to the children of Iowa county officials and employees. Trivia night is brought to you by Election Systems & Software. Please thank them for their generous support of ISAC scholarships.

Tables of eight will compete in a trivia competition consisting of 10 rounds of 10 questions each based on themed categories. Tables will work as teams and submit answers at the end of each round. Correct answers will be given after each round. Scores will be tallied at the conclusion of the evening, the winning table will be announced, and the \$800 cash prize will be awarded to the winning table. Come challenge the district 6 auditors as they try to defend their title!

Registration includes snacks and keg beer. A cash bar will be available as well. Door prizes will be given between rounds. Question? Contact Rachel Bennett at [rbennett@iowacounties.org](mailto:rbennett@iowacounties.org).

**Registration**

I wish to register as an individual for \$40.

I wish to register a table for \$320.

I don't want to play, but I want to spectate (includes food and beverage) for \$10.

I would like to volunteer to help with trivia night instead of participating.

Name: \_\_\_\_\_ County: \_\_\_\_\_ Office: \_\_\_\_\_

Table Team Name: \_\_\_\_\_

(We will collect all team member names during the event for door prize drawings.)

**Sponsorships and Donations**

SOLD - Event Sponsor: \$2,000 – Emcee the entire event, materials at every table, signage, and more.

- Beverage Sponsor: \$500 – Signage on bar and more. Opportunity to provide door prize.

- Snack Sponsor: \$500 – Signage with snacks and more. Opportunity to provide door prize.

- Round Sponsor: \$250 – Announced as sponsor of a round of trivia. Opportunity to provide door prize.

Door prize donation: \_\_\_\_\_ Donor: \_\_\_\_\_ Value: \$ \_\_\_\_\_

(Door prize donations will be accepted from ISAC preferred vendors, members, affiliates, and fall school exhibitors.)

ISAC Education Foundation donation: \$ \_\_\_\_\_ This donation is in honor of \_\_\_\_\_.

Thank you for your participation and support, and GOOD LUCK!



**ISAC/CM&MHDS 24th Annual Conference  
Team Work Makes Dreams Work  
September 13 and 14, 2016**

<b>Tuesday, September 13, 2016</b>	
7:30 am - 9:00 am	<b>Registration and Morning Refreshments</b>
9:00 am - 10:30 am	<b>Opening Keynote: Behavioral Interventions for Autism</b> Alyson Beytien
10:30 am - 10:45 am	<b>Break</b>
10:45 am - 12:00 pm	<b>Visual Systems and Other Behavioral Supports for Autism</b> Alyson Beytien
12:00 pm - 1:00 pm	<b>Lunch</b>
1:00 pm - 2:15 pm	<b>Tools for Talking When the Stakes are High</b> Tom Esch
2:15 pm - 2:30 pm	<b>Break</b>
2:30 pm - 4:00 pm	<b>Closing Keynote: Now Go Leap Buildings in a Single Bound</b> Tom Esch

<b>Wednesday, September 14, 2016</b>	
7:00 am - 8:00 am	<b>Morning Refreshments</b>
8:00 am - 12:00 pm	<b>Mandatory Reporter Certification, Dependent Adult and Child</b> Dianna Nicholls-Blomme
10:30 am - 10:45 am	<b>Break</b>
10:45 am - 12:00 pm	<b>Mandatory Reporter Certification-Continued</b>
12:00 pm - 1:00 pm	<b>Lunch</b>
1:00 pm - 2:15 pm	<b>Ethics</b> Bruce Buchanan
2:15 pm - 2:30 pm	<b>Break</b>
2:30 pm - 4:00 pm	<b>Ethics-Continued</b>

8:00 am - 9:15 am	<b>TBI Effects and Outcomes</b> Dr. David Demarest
9:30 am - 10:30 am	<b>TBI Panel</b> Dr. David Demarest, Lindsay Vaux, Clinical Director AT OWL and individuals with lived experience and family
10:45 am - 12:00 pm	<b>Host Homes</b> Jen Zajicek and panel
12:00 pm - 1:00 pm	<b>Lunch</b>
1:00 pm - 2:15 pm	<b>Behaviors and Interventions in the ID Population</b> Jessica Schwartz
2:15 pm - 2:30 pm	<b>Break</b>
2:30 pm - 4:00 pm	<b>HIPPA and the Iowa MH Law</b> Beth Manly

# Technology Center

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## CSN Overview

The Community Services Network (CSN) is a software package that gives entities across Iowa access to a centralized repository of client information. Through CSN, entities are able to integrate with county auditor accounting systems; access and update client medical information; track client progress and service history; and determine client eligibility, residency, and legal standing all in real-time. By having access to this vital information, local care coordinators are able to provide a better continuum of care even if a client has moved from another region, is using a new provider, is incarcerated, or is unable to personally provide their medical history.

While Mental Health and Disability Services (MH/DS) makes up a large portion of CSN's usage, CSN incorporates other service entities as well and has continued to grow and change since its formation. In light of this, we would like to take a moment to review the entities we serve and how they use the CSN system.



**Gina Wernimont**  
Administrative Analyst  
[gwernimont@iowacounties.org](mailto:gwernimont@iowacounties.org)

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## Mental Health and Disability Services (MH/DS) Regions

On June 30, 2014 mental health services in Iowa were organized into MH/DS Regions, transitioning from a county-based to a region-based system. MH/DS Regions are consortiums of counties created to coordinate community services that assist persons with disabilities attain their maximum level of independence. MH/DS Regions utilize CSN to create budgets, process regional claims, enter all facets of client management, and generate state-mandated and ad hoc reports.

## Targeted Case Management (TCM)

Targeted Case Management helps Medicaid members with chronic mental illness, intellectual disabilities, brain injury, and /or developmental disabilities access interrelated medical, social, and educational services. Targeted Case Managers use CSN to coordinate client services, bill Managed Care Organizations, submit service referrals, and enter client care plans, case notes and narratives.

## County Community Services

All 99 Iowa counties provide a wide range of community services that fall outside of MH/DS and many use CSN to pay community services claims at a county level. County Community Services include General Assistance, Substance Abuse, and Veterans Assistance.

## General Assistance (GA)

General Assistance (GA) is provided on a county level and services offered differ from county to county. Common GA services include financial assistance for individuals and families to pay for clothing, furniture, funeral services, health supplies, property taxes, food, rent, utilities, and household/personal items. GA applicants must meet eligibility, residency, and income requirements. By providing GA, counties attempt to ensure their residents do not fall through the cracks during periodic times of financial need or while awaiting approval of long-term services. County GA programs use CSN for client management, to determine client eligibility, and to process GA claims.

## Substance Abuse (SA)

While Substance Abuse programs are administrated on a county level, there is a large amount of treatment overlap with regional MH/DS programs. The comprehensive nature of CSN makes coordinating these services more effective for clients and providers. Substance Abuse programs use CSN for client management and to process claims.

## Veterans Assistance (VA)

While medical assistance is provided to veterans on a federal level, counties can use CSN to process Veterans Assistance administrative claims.

## Mental Health Advocates (MHAs)

Mental Health Advocates are the newest addition to the CSN family of entities, with the on-boarding process beginning in fall of

# Technology Center

2015. The Iowa State Association of County Supervisors strongly encourages all MHAs to use CSN to track mental health committals, enter case notes and contact times, and generate quarterly reports.

## Providers

Providers of Home- and Community-Based Services (HCBS) Waiver and Habilitation services are also a recent addition to the growing list of CSN entities. The inclusion of providers came about from identifying the need to report on client outcomes. Providers are using CSN to increase data integrity with standardized outcomes that allow care coordinators to more accurately assess care plan success. Standardized outcomes are based on the Five-Star Quality measurement system. Measures include community inclusion based on spiritual, civic and cultural involvement; somatic care; community living based on a safe, affordable and accessible living environment; and employment. Additional types of providers will be on-boarded as more outcomes are added. Currently, providers access CSN via a portal, but will have specialized roles and direct access with the release of CSN 3.0 - the new version of CSN that is currently in development.

## What Else Can CSN Do For You?

CSN users have 24/7 access in any location with internet access, secure off-site data storage, and daily backups. CSN's shared maintenance and development costs structure help reduce entity spending. CSN reporting tools can help entities increase the validity and consistency of their data for improved planning, funding and performance measurement decisions. If you are interested in learning about expanding the ways your entity utilizes CSN or in using CSN as a general client management system, please contact [jscott@iowacounties.org](mailto:jscott@iowacounties.org).

Sources: <https://dhs.iowa.gov/mhds-providers/providers-regions/regions>, <http://dhs.iowa.gov/mhds/disability-services/targeted-case-management>

## Welcome, Chris

I was born in the small town of LeMars. I am the oldest of four children. I believe being the oldest of four gave me dependability and responsibility. My parents raised my siblings and I in Sioux City, and then we relocated to Marshalltown during my freshman year of high school.

While living in Marshalltown I attended Marshalltown High School and was a four-year varsity wrestler. My senior year I placed 6<sup>th</sup> at the State Wrestling Tournament at 112lbs. I truly enjoyed the sport and all that I gained from it

After high school I worked as a Line Supervisor for Sioux-Preme Packaging Co. in Sioux City. I later moved to Iowa City and was employed at Rocktekn Manufacturing. While living in Iowa City I met my now fiancé Brittney who is an RN at Mercy Medical, and recently accepted a position as a cardiac/telemetry nurse. We are currently raising two boys, a cat named Llyod, and a Shiba Inu dog named Thor.

While working in factories I decided to go back to school and further my education. I attended Kirkwood Community College where I found my passion for software developing. I graduated in May of 2016 with a Java Certificate and a .Net Certificate with an Applied Science Degree in Software Developing.

I recently took up golfing as a hobby, which I am quickly learning you need a lot of patience if you are not a natural Tiger Woods or Zach Johnson. None the less, I enjoy the summer greens, fairways, and the integrity of the game. In the fall I am a football fan and will be attending football games to cheer on my Iowa Hawkeyes and Dallas Cowboys. As a former wrestler I also enjoy the UFC and going to events to cheer on my favorite fighters.

Graduating from Kirkwood as a Software Developer is what brought me to ISAC, and I am confident that while working here I will learn new developing skills and new techniques while developing. I am very excited to start my new career as a .Net Developer and can't wait to utilize my skills with this great team.



## Chris Schwebach

Software Developer

[cschwebach@iowacounties.org](mailto:cschwebach@iowacounties.org)

# Criteria and Procedures for ISAC Scholarships

The Iowa State Association of Counties (ISAC) is a private, nonprofit corporation whose members are county officials and employees from the 99 counties in Iowa. ISAC has established the following criteria and procedures for granting scholarships:

1. Eligibility to apply is limited to children of current county officials or employees. This does not include city employees, employees of county extension offices, or candidates who are themselves county employees.
2. At least one (1) \$1,000 scholarship shall be awarded annually.
3. The candidates must be seniors in high school.
4. This is a one (1) year scholarship, and can be received only once by an individual.
5. The scholarship can be awarded to anyone who will be a full-time student of any college requiring at least a minimum of two (2) years for a degree.
6. The scholarship monies will be paid directly to the college; one-half upon acceptance, one-half upon completion of the first semester.
7. The candidates must provide personal reference statements from three (3) individuals other than family members, complete an application, and submit to an interview.
8. The criteria used in awarding the scholarship will be scholastic achievement, financial need, participation in extracurricular/community activities and overall character.
9. The scholarship committee shall award all scholarships and the decision of the selection committee shall be final.
10. The scholarship committee shall consist of seven (7) members, to be appointed by the ISAC President. The selection committee shall consist of one (1) representative from each ISAC district, plus one (1) member of the ISAC Board of Directors.
11. ISAC reserves the right to verify any information provided on any application.
12. Scholarships will be awarded at the ISAC Spring School in March.
13. Scholarship winners have two years to use their award. During the two years, they may apply to the scholarship committee for an extension of the time limit. The scholarship committee shall recommend to the ISAC Board of Directors whether to allow the extension of the time limit.
14. It is a requirement of the finalists for this scholarship to come in and participate in a personal interview (early February) with a panel of judges or you may be disqualified for the award.
15. Applications must be **postmarked by December 9, 2016**.
16. **Applications should be mailed to:  
ISAC, 5500 Westown Parkway, Suite 190, West Des Moines, IA 50266-8202**



# Scholarship Application

Name of Applicant \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Zip \_\_\_\_\_

Home County \_\_\_\_\_ Home Phone \_\_\_\_\_

E-mail Address \_\_\_\_\_ Name of High School \_\_\_\_\_

Mother's Name \_\_\_\_\_ Mother's Job Title/Occupation \_\_\_\_\_

Father's Name \_\_\_\_\_ Father's Job Title/Occupation \_\_\_\_\_

Which parent is a county official or employee? \_\_\_\_\_

County and Department \_\_\_\_\_ County Position \_\_\_\_\_

County Phone # \_\_\_\_\_ Work E-Mail \_\_\_\_\_

Proposed college \_\_\_\_\_

Have you taken the SAT/ACT \_\_\_\_\_ If so, your score \_\_\_\_\_

Total Class Size \_\_\_\_\_ Rank in Class \_\_\_\_\_ Grade Point \_\_\_\_\_ on a 4.0 scale

## Financial Need:

Family's Household Income: *Please circle*

(\$0 - \$49,999) (\$50,000 - \$99,999) (Over \$100,000)

Special circumstances that have impacted your family's income: \_\_\_\_\_

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**Essay:** On another sheet of paper type an essay of no more than 250 words explaining your career plans and future goals. **MAKE US SEE THE REAL YOU.**

**Extra Curricular Activities:** In the space provided, please identify your most significant extra curricular activities, school activities, work experience, etc. that might be helpful to the committee in judging your application.

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**References:** We need personal reference letters from three (3) individuals other than family members (Teachers, employers, advisors, etc.).

**Transcript:** Please enclose a copy of your high school transcript with your application.

**Technology Award:** We are also offering the Iowa Counties Information Technology (ICIT) Award Scholarship. This scholarship is available to an applicant who intends to pursue a two (2) or four (4) year degree in a technology related major and/or a degree that leverages/incorporates technology. If this applies to you, on another sheet of paper which should be label "Technology Essay," tell us about your plans in this area.

**For you to be considered for a scholarship you must:**

- 1. Return application filled out completely and signed**
- 2. Enclose your typed essay**
- 3. Include three letters of personal reference**
- 4. Enclose your official high school transcript**

**NOTE: If you do not comply with these requirements, your application may be disqualified.**

Return to: Iowa State Association of Counties, 5500 Westown Parkway, Suite 190, West Des Moines, IA 50266-8202. **Applications must be postmarked by December 9, 2016.**

**I hereby certify that this application contains no misrepresentation or falsifications and that the information given by me is true and complete to the best of my knowledge and belief.**

**Signature of Applicant:** \_\_\_\_\_

# Miscellaneous

The IPERS Investment Board held its regular quarterly meeting on Thursday, June 23, 2016. As one of seven voting members on the Board, I attend these meetings that are designed to review and update the status of the current investments of the 28 billion dollar Iowa Public Employee Retirement System (IPERS). IPERS recently conducted an in-depth study to assess the needs of our retirement system members, both retired and active. Ten thousand calls were made and opinions were sought from IPERS members, their employers, policymakers and elected officials.

## Wayne Walter

IPERS Investment Board Member  
Winneshiek County Treasurer  
[wwalter@co.winneshiek.ia.us](mailto:wwalter@co.winneshiek.ia.us)

The survey revealed a number of interesting findings; many members believe our funding status or account balance determines benefit amounts, many believe it is possible to roll over their account to an IRA, and some think it is possible to borrow against an IPERS account. None of these are true. IPERS is a "Defined Benefit Plan," which means our benefits are backed by the state of Iowa and not subject to our funding status. We also found that 30% of our members do not know our funding status, which is currently in the 85% range.

On the other hand, 90% of the respondents to the survey rated IPERS benefits as very good or excellent. Members feel IPERS is a good plan that provides clearly written benefit statements and they are confident that their benefits will be paid for life. In fact, it is interesting to note that we currently have more than 130 IPERS retirees who are over 100 years old who get benefits payments from IPERS.

Having said all that, this continues to be a challenging time for the Investment Board. Since 60% of future benefits will be paid from revenue earned on the IPERS fund balance, the Board must seek out those investments that will help meet our target of 7.5% annual return. As I write this, some government securities, such as the benchmark German 10-year Bond, have recently dropped as low as 0.02% yield and the Swiss equivalent actually has a negative yield. The Federal Reserve Chair Yellen suggested that low, long-term interest rates on government bonds may be the "new normal."

On the positive side, the IPERS program 10-year Risk Report prepared by Willshire Associates projects our fund to earn 6.18%. Of course, we will continue to seek ways to increase that income to meet our 7.5% target. We are currently expanding our investments in better yielding categories that still have an acceptable risk level.

On a related topic, Governor Branstad recently signed HF 2331, a bill that prohibits state funds from investing in companies that boycott Israel. This ban will apply to the State Treasurer, Board of Regents and IPERS as well other state funds. These companies will be added to a list of other legally prohibited investments for our Fund.

The IPERS Investment Board occasionally gets requests from individuals or groups who ask us to avoid investing in companies for various reasons, such as their status as a fossil fuel company or the political activities of company management. Our Board generally feels that our obligation is to make the best investment possible for our members within limits of the law and our most important goal is meeting our funding needs.

During the first 11 months (July 2015 - May 2016) of our current fiscal year, IPERS has paid retirement benefits that total \$1,655,877,225.71. We currently have 114,231 retirees receiving an average monthly benefit of \$1,329.39. Interestingly, during those same 11 months, IPERS has notified 4,983 public employees in Iowa that they have reached age 70, and even though they are still employed they will begin receiving benefits.

As always, the IPERS staff can provide specific member counseling services for those who may be considering a retirement date. Please feel free to contact the IPERS office if you need any specific information about your benefits.

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Iowa Public Agency Investment Trust (IPAIT)  
National Association of Counties (NACo)  
Nationwide Retirement Solutions  
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# 2016 Calendar

## August 2016

- 25-26 ISAC LPC Retreat  
(Hotel Renovo, Urbandale)
- 31 ISAC Scholarship Golf Fundraiser  
(Toad Valley Golf Course, Pleasant Hill)

## September 2016

- 13-14 CM&MHDS Annual Conference  
(West Des Moines Sheraton)
- 18-21 ISSDA Jail School  
(Holiday Inn Airport)
- 21-23 ISAC Board of Directors Retreat  
(Linn County)
- 29 ISAC LPC Meeting  
(ISAC Office)

## October 2016

- 27-28 ISAC Board of Directors Meeting  
(ISAC Office)

## November 2016

- 30-2 ISAC Fall School of Instruction  
(Veteran's Memorial Community Choice  
Credit Union Convention Center, Des  
Moines)

## December 2016

- 4-7 ISSDA Winter School  
(Holiday Inn Airport, Des Moines)
- 6-8 ICEA Annual Conference  
(Scheman Building, Ames)
- 14 ISAC Board of Directors Meeting  
(ISAC Office)

If you have any questions about the meetings listed above or would like to add an affiliate meeting to the ISAC calendar, please contact Kelsey Sebern at [ksebern@iowacounties.org](mailto:ksebern@iowacounties.org).

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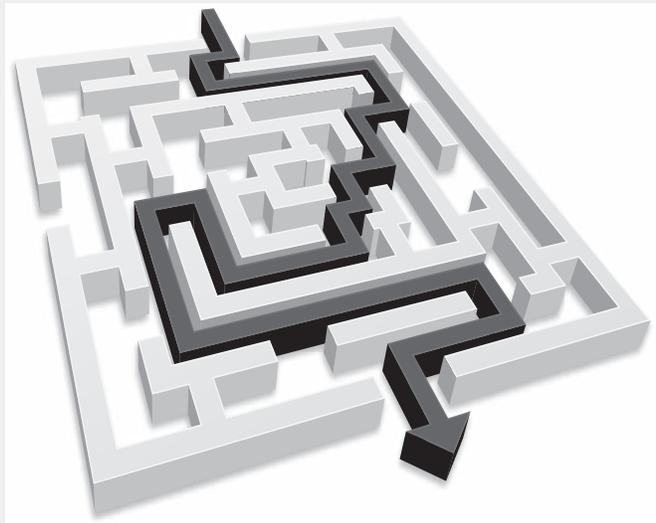


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