

Iowa School Finance Information Services

# PROGRAM & SERVICES GUIDE FY 2023



**ISFIS, Inc.**

Iowa School Finance Information Services

# ISFIS PARTNERS THANK YOU



At ISFIS, we're here for you. We strive to provide best-in-class service, tools and training, while keeping your costs low. Our a la carte approach allows you to pick and choose the services most applicable to your district.

Our decades of combined experience ensure you'll get accurate information fast. If we don't know the answer, we will do our best to find it for you.

Our best ideas come from your questions, so let us know how we can better serve you!

Thank you for your business,

Larry & Margaret

“

**DATA IS THE FIRST INGREDIENT IN YOUR  
RECIPE FOR SUCCESS.**

**-MARGARET BUCKTON, ISFIS PARTNER**

”

# OUR CORE SERVICES

Iowa School Finance Information Services (ISFIS) was created in 2009 to provide electronic finance tools and financial consulting services to Iowa public schools. Our mission is to help schools elevate competence while minimizing workload. We apply our decades of combined experience working with schools, public policy and data analysis to:

- develop electronic tools to effectively organize and share data
- educate business managers and superintendents on school finance issues affecting their work
- improve markets that serve public education by creating new services that don't exist or providing competitive services that aggregate schools' collective buying power
- empower school leaders with information and supports to help them connect with staff, parents, community and state level decision-makers to benefit students

School districts pay an annual subscription, based on enrollment, to access our tools, data, and resources. Additional services are offered a la carte to schools since each district has unique needs and priority areas.

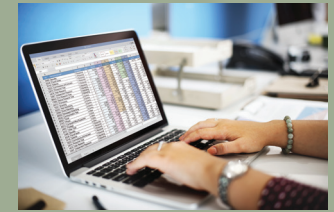


**SUBSCRIBER TOOLS  
ARE AVAILABLE  
ON OUR WEBSITE  
[WWW.IOWASCHOOLFINANCE.COM](http://WWW.IOWASCHOOLFINANCE.COM)**



## BASIC FINANCE SUBSCRIPTION

ISFIS Basic Finance Subscription includes a suite of tools: FACT, CFPM, Advanced Mapping, and much more.



Access to Webinars and virtual presentations, unlimited phone and email support, district data and comparisons are also included. We believe data is the first ingredient in your recipe for success. We then provide supports to help you understand how to make data-driven decisions in the best interest of your district and students.

## ADVOCACY & LOBBYING SUPPORTS

ISFIS provides legislative updates to ISFIS finance subscribers.

ISFIS partners also provide advocacy, public policy, data and lobbying supports to non-profit education organizations representing public schools including the Urban Education Network of Iowa (UEN) and the Rural School Advocates of Iowa (RSAI).



## SCHOOL SOLUTIONS

ISFIS offers additional a la carte programs and services.

Most of our services are offered to ISFIS subscribers at a discounted rate. Some are offered by ISFIS directly and others are offered in partnership with best-in-class vendor partners.



These services often began when school leaders called ISFIS with a problem needing a solution. Programs include Online Board/Policy Websites, Background Checks, Leader Search Services, Equipment Maintenance Insurance, GASB 75 Compliance, and a Natural Gas Risk Pool.

# MAXIMIZE YOUR SUBSCRIPTION

To maximize the benefits from your ISFIS Finance Subscription:



## WHITELIST OUR EMAILS

Add ISFIS email addresses to your “safe sender list” within your email program to ensure ISFIS communications never go to your spam folder. Our emails come from either [\\*@isfis.net](mailto:isfis@isfis.net) or [\\*@iowaschoolfinance.com](mailto:isfis@iowaschoolfinance.com). **Keep us updated with any district contact changes.**



## REQUEST A LOGIN

To our [www.IowaSchoolFinance.com](http://www.IowaSchoolFinance.com) website, for access to the vast quantity of available “subscriber only” content. Email [service@iowaschoolfinance.com](mailto:service@iowaschoolfinance.com) for assistance with logins or passwords.



## PARTICIPATE IN WEBINARS

Webinars are held weekly during the legislative session and periodically during the rest of the year. All webinars are complimentary to subscribers and recorded for later access.



## ACCESS OUR TOOLS

A suite of tools is included with your subscription, available on the ISFIS subscriber website. From Basic Finance to sophisticated projections, find a tool and support that takes you to the next level. Check out the Financial Analysis Comparison Tool (FACT) and the Comprehensive Financial Projection Model (CFPM).



## CONTACT US

We offer unlimited phone and email support to subscribers. We are available to answer your questions, offer expertise and advice, or just talk through next steps. Find our personal contact information on the ISFIS website to call, text or email us.

# TESTIMONIALS FROM ISFIS SUBSCRIBERS

“ISFIS has provided our district with great support in budget preparation and budget forecasting, and with easy accessibility to staff, our questions get responses on the spot. Margaret and Larry have been wonderful to work with and I really value their expertise as well as their insight to what the state legislature is doing with regards to finances.”

“Great webinar on Wednesday! Very informative and I think it is great we can stay in our district and learn from these webinars. It is a win/win situation!”

“Thank you, thank you! I owe you forever, just name your price.”

“I just came from Minnesota and had a good handle on Minnesota School Finance, but am slowly getting into the flow of Iowa School Finance. After going through the ISFIS reports, I have gleaned more information in the last half-hour then I have in the months I have been here and attended other finance training conferences. I really like comparative data. Thank you and I look forward to working with ISFIS.”

“ISFIS provides a wealth of information for our board members and school leaders. The lessons and advice from ISFIS Webinars and Building Blocks are highly recommended.”

“The[CFPM 5-year] projection model is a game changer for us.”

“We always appreciate that Larry gives us just the nuts and bolts, no fluff.”

“Thank you for the words of wisdom and assistance drafting letters. Our vote passed last night and those were instrumental getting people on board to use SAVE. You were so helpful in our moment of need, thank you!”

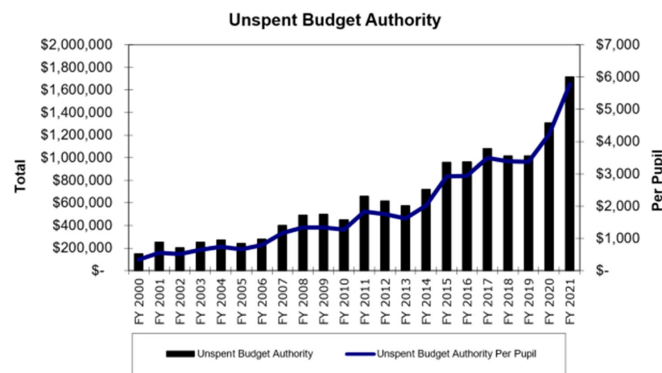
“Information provided by ISFIS & RSAI gives us the background and talking points needed in our advocacy efforts with our stakeholders and legislators.”

“Protection of our students and employees is imperative; that’s why 3rd Degree Screening and ISFIS are trusted partners for our large school district.”

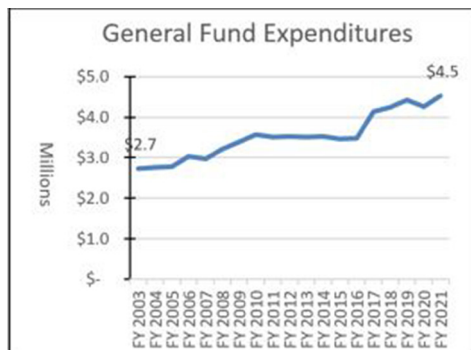
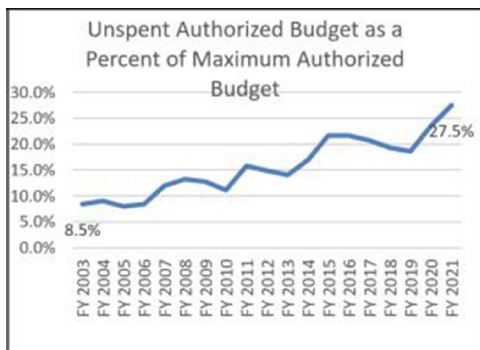


## FINANCIAL ANALYSIS COMPARISON TOOL (FACT)

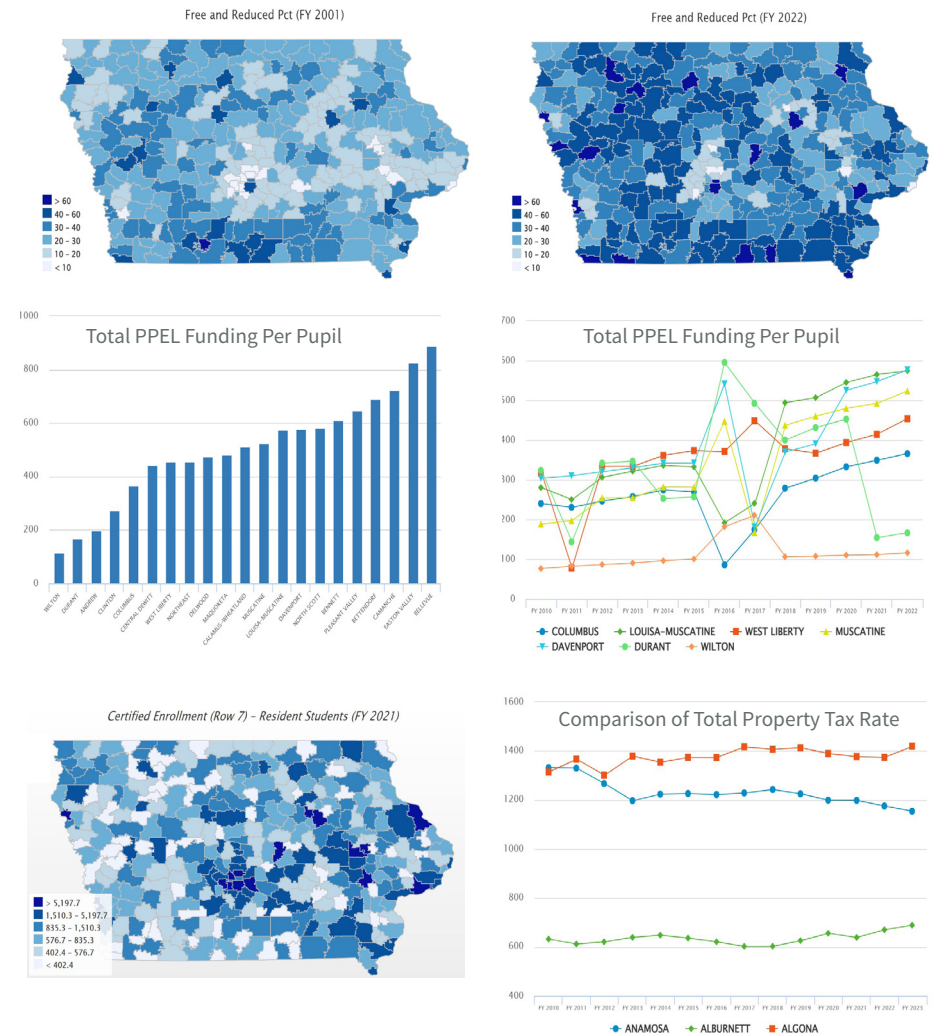
- Property tax rates, valuations and dollars levied
- Income surtax rates
- General Fund expenditures, solvency ratios, and Unspent Authorized Budget
- Special Education deficit/surplus history
- Per student funding by revenue source
- Open Enrollment in, out and net history
- And much more



The main benefit of the FACT Tool is the ability to quickly and easily see data trends and compare your district to others. A simplified user interface eliminates endless scrolling trying to find the data you're looking for. See a data comparison need that is not covered? Let us know and we'll see how to best include it in our tools.



The ISFIS Interactive Mapping Tool provides over 4000 data variables displayed in a map or graphical format for a more visual presentation. Unlike two-dimensional spreadsheets, mapping adds a visual dimension of geographic comparisons. Much of the data from the FACT Tool is included here as well, plus other financial, demographic, salary, enrollment, special education, transportation and student achievement data variables.



Graphs can be used as comparisons over time for a single district, or a point in time comparison with other districts. There are limitless possibilities. Data is continuously added as available. Visual representation of data is an effective way to share information with your stakeholders and generate good questions for your leadership team.

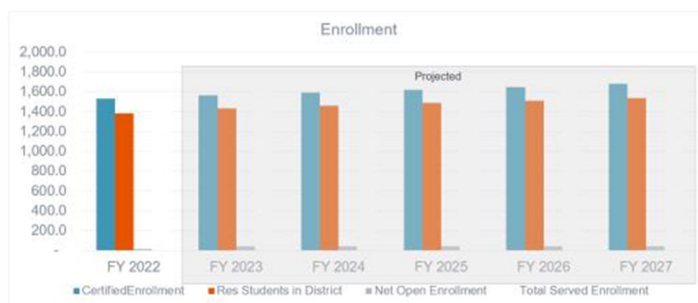
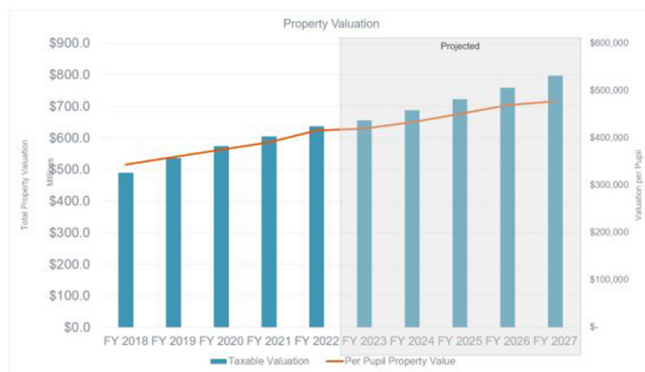
# COMPREHENSIVE FINANCIAL PROJECTION MODEL

Developed in partnership with Piper Sandler, the ISFIS Comprehensive Financial Projection Model (CFPM) provides you with a five-year future projection of your district data such as property tax rates, unspent authorized budget, solvency ratio and a detailed aid and levy worksheet for the upcoming five fiscal years. The CFPM will aid in planning, analysis and discussions with school leaders and the community.

ISFIS and Piper Sandler offer two options of the CFPM, a do-it-yourself BASIC MODEL and a do-it-for-me PRO MODEL. The CFPM BASIC Model is included with ISFIS Finance Subscription, and available to download from the ISFIS Subscriber website. A checklist and instructions are posted on the site and workshops are offered each fall to assist school leaders with setting up the Basic Model on your own.

The CFPM PRO MODEL is available for \$1,000/year and includes setup of your CFPM by ISFIS or Piper Sandler staff, enhanced scenario planning options and assistance, one-on-one discussion around your district's assumptions in the CFPM, and a virtual presentation of your CFPM Projections upon request.

To get started with the CFPM, visit [www.IowaSchoolFinance.com/cfpm](http://www.IowaSchoolFinance.com/cfpm).



PIPER | SANDLER

## BOARD/POLICY HOSTED WEBSITE

Available a la carte, an ISFIS Board/Policy Hosted Website allows customized school policies accessible anywhere, anytime, by your board, employees or community members. Authorized district personnel can edit or post content online so all stakeholders always have access to the approved policies. An audit trail logs revisions. ISFIS builds a template mirroring the look of the district's main website, handles all aspects of the website hosting, and provides ongoing support. Districts can upload content to the new site or ISFIS will upload your initial manual on your behalf for an additional fee. The site also supports posting board meeting agendas, attachments and minutes creating a one-stop location for board content. The site is searchable to quickly find keywords across all content.







# TRAINING RESOURCES

## WEBINARS

ISFIS offers regular Situation Report (SitRep) Webinars, weekly during the legislative session and periodically throughout the rest of the year. SitRep Webinars include information such as legislative updates, upcoming deadlines, status of state revenues, education related tools, data and trends, and much more. Special Topic Webinars focus on training or exploration of critical topics. These webinars are free for subscribers and are recorded for later viewing.

## BUDGET WORKSHOPS

ISFIS partners with Iowa's AEAs to provide budget workshops at AEA sites around the state for Superintendent and SBO teams. These workshops allow each district to prepare their district's budget in one productive day without interruption. Participants also benefit from networking and discussing regional issues with peers.

ISFIS will prepare a custom PowerPoint for attendees to help present the budget to the Board, staff and community.

## CFPM FALL WORKSHOPS

Each Fall, ISFIS and Piper Sandler host a series of workshops across the state for attendees to complete an in-depth, district-specific, five-year projection model. Using our Comprehensive Financial Projection Model, attendees learn how to use the tool to project property tax rates, unspent authorized budget, solvency ratio, a detailed aid and levy worksheet for the upcoming five-year period, and much more.

## BUILDING BLOCKS

ISFIS Building Blocks are training videos helpful for orienting new school leaders or for reviewing key topics before important finance or election cycle decisions. These short 5-20 minute videos are free for subscribers and often come with an accompanying PowerPoint presentation and suggested activities. These tools may be used for individual or group study. They are designed specifically for superintendents, school business officials, board members or other leaders who wish to learn more about Basics of Iowa School Finance, Nuts and Bolts of Board Meetings, Board Roles and Responsibilities, Open Meetings, Ballot Initiatives, Public Records, Special Education finance, Sales Tax and more. Need a training module on a new topic? Just ask us.

## CUSTOM TRAININGS & WORKSHOPS

ISFIS offers free virtual trainings and workshops to subscriber districts, such as school board training on the basics of Iowa school finance, a budget review, or other specific topics. We also can serve as outside experts to help with local community conversations around mergers or sharing arrangements, passing PPEL, ISL, revenue purpose statements or bond issues. ISFIS subscribers receive a reduced hourly consulting rate for in-person meetings.

## PHONE & EMAIL SUPPORT

ISFIS is here for unlimited phone and email support complimentary to subscribers. Everything from a quick fact check before a board meeting or walking a new superintendent or SBO through the district's financial status. If we don't know the answer, we probably know someone who does. We depend on your questions to develop timely and relevant SitRep Webinar content and new data tools for all subscribers, so call, text, or email us anytime.

# SCHOOL SOLUTIONS

## WE SCREEN PARTNERS SO YOU DON'T HAVE TO

ISFIS offers programs and services outside of the ISFIS Finance Subscription. These solutions are available a la carte to schools since each school district has unique needs and priority areas. Many of these are offered to ISFIS subscribers at a discounted rate. Some are offered in partnership with best-in-class vendor partners. These programs and services typically result from a school leader contacting ISFIS with an unmet need.



### IOWA LOCAL GOVERNMENT RISK POOL

ISFIS and WoodRiver Energy are service providers to the Iowa Local Government Risk Pool (Iowa LGRP). The Iowa LGRP allows districts to join a 28E entity to fix their natural gas budget for the fiscal year and pay a lump-sum annual premium, transferring risks of pricing, tariff and consumption swings away from the district, making the premium allowable from the district Management Fund. The Iowa LGRP was established in 2019 and is governed by superintendents. Learn more at [www.IowaLocalGovernmentRiskPool.org](http://www.IowaLocalGovernmentRiskPool.org).



### TRADITIONAL NATURAL GAS PURCHASING PROGRAMS

ISFIS also partners with WoodRiver Energy, an Iowa Certified Natural Gas Provider, to offer traditional natural gas purchasing plans for schools outside of the Iowa LGRP. Plans offer districts budget protections (rather than budget certainty) at competitive prices.

### BACKGROUND CHECKS BY 3RD DEGREE SCREENING



ISFIS partners with 3rd Degree Screening, an Iowa-based nationwide provider of background checks and employment screening services to offer pre-employment screening services. This program helps districts create a safe learning environment and comply with Iowa law. The “Quick App” feature allows users to email applicants the Disclosure and Authorization form and the Iowa Child and Adult Abuse registry forms to be completed electronically, eliminating physical collection of forms and extra data entry for applicants and districts. A batch upload option for multiple new hires or processing 5-year rechecks saves staff time.

### LEADER SEARCH BY GRUNDMEYER



Grundmeyer Leader Search works with Iowa school districts to recruit, interview and hire leaders that fit best with district goals and values. Trent Grundmeyer and his team have seen an extremely high success rate with their clients. Newly hired school leaders create an onboarding plan that includes ISFIS support for district-specific finance review and training to ensure a smooth transition into their new position.



### EQUIPMENT MAINTENANCE INSURANCE BY JESTER INSURANCE

Districts use this program from Jester Insurance Services to insure the school's electrical and electronic equipment through the use of an insurance policy, paid from the district's Management Fund. This policy covers replacement and repairs for more than 75 categories and 500 types of equipment. The insurance policy may also offer coverage for copier consumables, repairs to outdoor riding equipment, and certain HVAC preventative maintenance expenditures. Continue using your preferred vendors, or the policy will reimburse the district for employees' time when maintaining or repairing covered equipment.

### GASB 75 COMPLIANCE SERVICE



ISFIS partners with Van Iwaarden Associates, one of the leading actuarial firms in the U.S., to offer GASB 75 Compliance Services at significant savings. A best in class AMM (Alternative Measurement Method) option is also available for smaller districts at a reduced rate. School personnel find partnering with us easier and less expensive than other providers they have used in the past.



# ADVOCACY SUPPORTS

## LEGISLATIVE ANALYSIS & DATA

ISFIS provides Subscribers with updates and analysis of proposed legislation on webinars throughout the legislative session, an annual webinar summarizing legislation signed into law following the conclusion of the legislative session, legislator contact info and biographies, and data to support conversations with local legislators.

## PUBLIC POLICY RESEARCH

ISFIS staff puts its decades of collective public policy research experience to work, with expertise in education funding, enrollment and other demographic forecasting, state and local tax policy, and economic development case impact studies. We are available to provide a critical review of public policy research reports for accuracy and legitimacy.

ISFIS Partners have well over 50 years combined public policy expertise that can help guide you through the legislative process.

## GEOCODING & MAPPING SERVICES

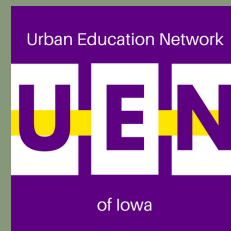
Other services, such as geocoding and mapping are available on a time and charges basis. Recent projects include mapping for bond issues canvassing, student addresses for planning bus routing or summer meal location sites, mapping for reorganization planning, and more.



# NONPROFIT ADVOCACY

## NONPROFIT ASSOCIATION MANAGEMENT & ADVOCACY SERVICES

ISFIS partner Margaret Buckton provides lobbying support and advocacy services for the Urban Education Network of Iowa (UEN) and the Rural School Advocates of Iowa (RSAI). Supports include a presence at the Statehouse, testimony and feedback on legislation or posted administrative rules, development of advocacy tools, sample advocacy letters, editing letters to the editor, identifying partners on a particular issue, and fiscal impact analysis of proposed legislation. ISFIS provides Association Management Services for both organizations including back-office functions such as membership, website, accounting, and coordination with the organizations' boards of directors.



Both organizations publish weekly reports and videos during the Legislative Session to share legislative impact on local schools and action steps to support conversations with local legislators. An annual legislative digest, an advocacy handbook, researched position papers/issue briefs, and various tools to assist with advocacy efforts are also produced by both organizations.



# EXPERT GUIDANCE

ISFIS partners serve as experts on school finance and legislative matters, providing background, research, data and guidance. We provide factual, nonpartisan data and information to inform policymakers, school leaders and the media about the impact of proposed legislation on Iowa's schools, taxpayers and students.

## EDUCATIONAL & ADVOCACY ORGANIZATIONS

ISFIS provides content and presentation at:

- Iowa's Area Education Agencies (Iowa's AEAs)
- Iowa Association of Supervision and Curriculum Development (Iowa ASCD)
- Members Impacting Students; Improving Curriculum (MISIC)
- Parents for Great Iowa Schools (P4GIS)
- Rural School Advocates of Iowa (RSAI)
- School Administrators of Iowa (SAI)
- Urban Education Network of Iowa (UEN)

## EXPERT REPRESENTATION

ISFIS has served on various task forces or stakeholder groups for the Iowa Department of Education, including the School Finance Roundtable, and the Iowa Department of Management. ISFIS also represents Iowa on the Regional Educational Laboratory (REL) Midwest Governing Board, and Drake University Head Start.

## EMERGING SCHOOL LEADERS

We teach classes to train Iowa's future Administrators, Superintendents and Business Managers:

- Drake University
- Iowa Association of School Business Officials (IASBO)
- Iowa Principal Leadership Academy
- Iowa School Business Management Academy
- Iowa State University
- University of Northern Iowa

## MEDIA/COMMUNITY

ISFIS is a resource and provides presentations throughout the year to media outlets for print or on camera interviews, community legislative advocacy groups, clubs such as Kiwanis, Rotary or PEO, various Democratic and Republican leaning chapters or organizations, leadership development organizations and much more.

# CONTACT US

Contact us or visit our website for more information about any of our products or services.



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