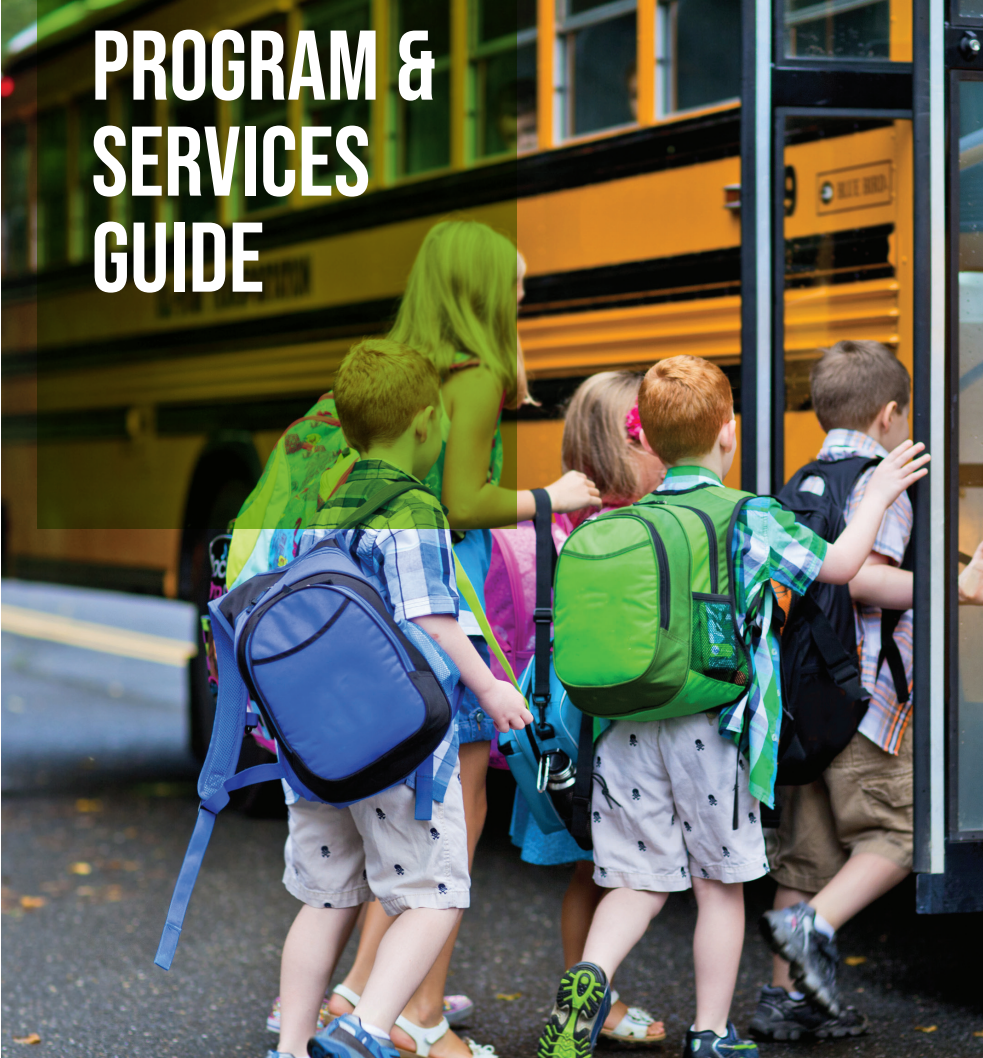


Iowa School Finance Information Services

PROGRAM & SERVICES GUIDE



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 from among other 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 & Jon

“

**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 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**

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 & POLICY

ADVOCACY FOR PUBLIC EDUCATION

ISFIS provides advocacy, public policy, data and lobbying supports to non-profit education organizations representing public schools.



BOARD & DISTRICT POLICY

ISFIS offers an annual Supplemental Policy Subscription in addition to the Finance Subscription. This includes our Policy Starter Sample Policy Manual, Policy Booster Updates, Online Hosted Website, Policy Q&A support and policy research.

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 Background Checks, Leadership Search Services, Equipment Breakdown Insurance, GASB 75 Compliance, LED Lighting, a Natural Gas Pool, and Student and Educator Technology Tools.

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 or *@iowaschoolfinance.com. Keep us updated



REQUEST A LOGIN

To our www.IowaSchoolFinance.com website, for access to the vast quantity of available “subscriber only” content. Email 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. Call, text, or email us; find our personal contact information on the ISFIS website.

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!”

“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 than 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.”

“I can’t wait to get this back to my district and present this [CFPM 5-year Projection] data. Thank you!”

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

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

“ISFIS is a wonderful resource for policy questions. They give insight to be compliant and offer suggestions to make policies more pragmatic. I highly recommend their service!”

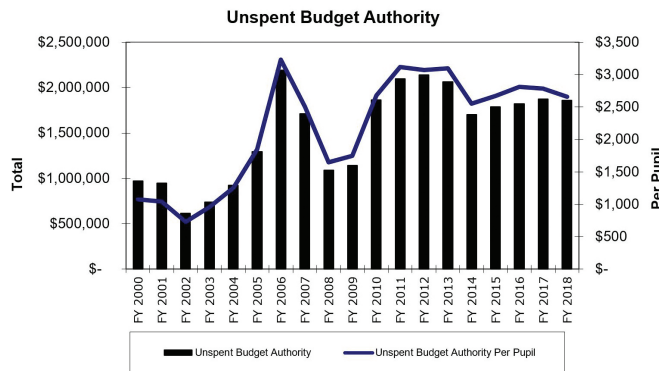
“Protection of our students and employees is imperative; that’s why 3rd Degree Screening and ISFIS are trusted partners for our large school district.”

FINANCE TOOLS

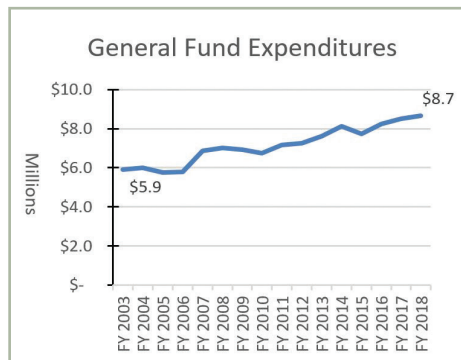
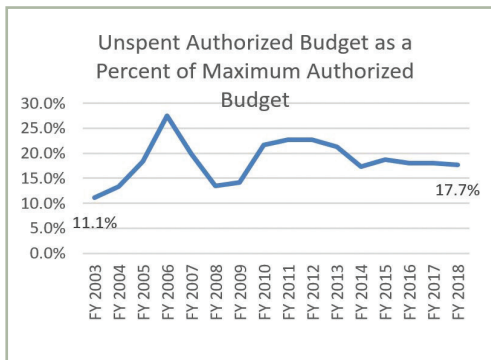
FINANCIAL ANALYSIS COMPARISON TOOL (FACT)

FACT Tool provides a huge amount of longitudinal information, and various ways to compare districts. Data is continually added to the FACT Tool, which contains the following:

- Property tax rates, valuations and dollars levied
- Income surtax rates
- General Fund expenditures and solvency ratios
- Each row of the Department of Management Unspent Budget Authority report
- Each row of the Certified Enrollment file is included
- And much more

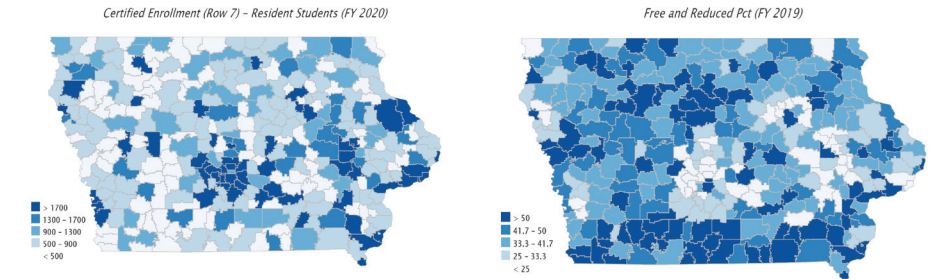


The main benefit of the FACT Tool is the ability to quickly and easily see data trends and compare your district to others. A simplified user interface eliminates endless scrolling trying to find the data you're looking for. See a data comparison need that is not covered? Let us know and we'll see how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



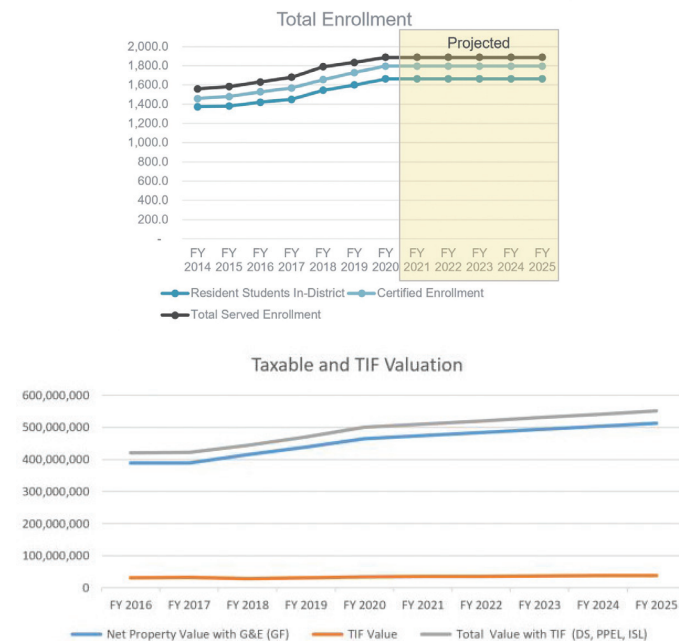
INTERACTIVE MAPPING TOOL

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, plus other financial, demographic, salary, enrollment, special education and transportation data variables.



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. This tool, included with ISFIS Subscription, will aid in planning, analysis and discussion with school leaders and the community. A CFPM PRO Model is also available for a fee.





TRAINING RESOURCES

WEBINARS

ISFIS offers regular Situation Report (SitRep) Webinars, weekly during the legislative session and monthly during 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

Each year, ISFIS partners with Iowa's AEAs to provide in-person budget workshops at AEA sites around the state for Superintendent and SBO teams. These workshops allow each district team to prepare their budget in one productive day without interruption, plus the benefit of networking and discussing regional issues with peers. ISFIS will prepare a custom PowerPoint for attendees to help present the budget to the Board 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 come with an accompanying PowerPoint presentations 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, Bond Issues, 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. Questions asked also help us 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 or Policy Subscriptions. 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.



NATURAL GAS & IOWA LOCAL GOVERNMENT RISK POOL

ISFIS partners with WoodRiver Energy, an Iowa Certified Natural Gas Provider, to offer a natural gas purchasing pool for schools with competitive pricing. Additionally, ISFIS and WoodRiver Energy serve as service providers for the Iowa Local Government Risk Pool (Iowa LGRP). The Iowa LGRP allows districts to join a 28E entity and pay a lump-sum premium to fix their natural gas expense for the fiscal year, transferring all risks of pricing, tariffs and consumption to the service providers, and allowing payment from the Management Fund.

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 then meet with ISFIS for district specific finance review and training to ensure a smooth transition into their new position.



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.



LED LIGHTING BY SITLER'S

ISFIS recommends Sitler's LED Supplies to provide competitive LED lighting for school districts at an unmatched price and service level. LEDs are the first step in creating a more energy-efficient building and are eligible PPEL expenditures, saving your district precious General Fund dollars. In addition to classrooms, LED's are ideal for gyms, parking lots and sports fields. And they improve the learning environment for students!



EQUIPMENT BREAKDOWN INSURANCE BY JESTER INSURANCE

Districts use this program from Jester Insurance Services to pay for the repair of the school's electrical and electronic equipment through the use of an insurance policy, paid from the district's Management Fund. This policy covers more than 75 categories and 500 types of equipment, and will reimburse the district for employees' time when 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.

POLICY SERVICES

SUPPLEMENTAL POLICY SUBSCRIPTION SERVICES

In addition to the Finance Subscription, ISFIS also offers a Supplemental Policy Subscription Service which includes:

POLICY STARTER

This is a sample Policy Manual provided and maintained by ISFIS, in consultation with school attorneys, legislative and executive branch decision makers, and school leaders. It is simple to use, completely searchable, and organized into manageable sections. We update it as legislative changes are required, for your reference. ISFIS will also research best practices and find examples of other policies important to your school board, even if not included in our Sample Policy Manual made primarily of policies mandated by state and federal law, rules and regulations. Just ask and we'll look into what other states or school boards have to offer.

POLICY BOOSTERS

Policy Boosters provide notification via email of recommended or mandated changes in policies, along with a description of the laws and rulings driving the changes. From new federal, state or administrative law to a continuous outpouring of state and federal court decisions, schools need to make sure board policy is serving the district, employees, and most importantly, the students served.

PHONE SUPPORT

Contact us for questions or for information regarding district policies, human resources issues and employee relations. This is an extremely efficient and inexpensive way to get quick answers to many of the routine questions about open meetings, public records and best practices. If a formal opinion is required, we will suggest you contact your school attorney or will provide an attorney referral.

ONLINE BOARD/ POLICY HOSTED WEBSITE

Customized school policies are accessible anywhere, anytime, by your board, employees or community members in this public website. Authorized district personnel can edit the manual online so all stakeholders have access to current policies. An audit trail logs all policy revisions. ISFIS builds a template mirroring the look of the district's main website and handles all aspects of the website hosting (with no monthly hosting fee). Districts upload the current policy manual to the new site. The site also supports posting board meeting agendas, attachments and minutes. It is searchable to quickly find keywords across all policies. ISFIS will upload your district's initial manual on behalf of your district for an additional fee.



ADVOCACY SUPPORTS

LEGISLATIVE BILL TRACKING & ADVOCACY SERVICES

ISFIS partner Margaret Buckton provides lobbying support for the Urban Education Network of Iowa and the Rural School Advocates of Iowa. Supports include a presence at the Statehouse, advocacy tools, legislator biographies, sample advocacy letters, and fiscal impact analysis of proposed legislation.

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.

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 75 years combined public policy expertise that can help guide you through the legislative process. Other services, such as geocoding and mapping are available on a time and charges basis.



STUDENT & EDUCATOR TECHNOLOGY TOOLS

ISFIS partners with best-in-class product & service providers and negotiates premier pricing on behalf of schools. We encourage districts to consider these technology tools for students and educators.



WriteToLearn® is a Pearson program that electronically scores student writing and aligns it to the 6-Traits or the College and Career Ready elements found on the ISASP. This writing practice tool, available for students in grades 4-12, allows teachers to assign more writing without the overwhelming responsibility of scoring it all. Excellent reports inform teachers where they need to go next in writing instruction.



EdifyAssess™ is an easy-to-implement electronic formative and interim, standards-based assessment tool for students in grades K-12. EdifyAssess informs teachers in easy-to-read reports at the district, school, classroom, and student level of student strengths and challenges. This data can be used to build needed professional development and most importantly to inform instruction.



Teacher Vitæ™ is a complete observation, evaluation, and professional development platform that can help school districts be more thorough, efficient, and consistent in their evaluation processes. This tool helps with easy scheduling making everything expected clear from the beginning to the end of the year. Teacher Vitæ™ easily aligns employee input and evaluator comments to standards, cutting down on paper, and keeping track of where each employee and evaluator is in the process. This tool also serves as a repository for licensure and certifications, as well as mandated and recommended professional development.

Contact Susie Olesen (susie@iowaschoolfinance.com or 515-251-5970 Ext. 6) for an on-site or electronic demonstration of any or all of these products.

CONTACT US

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



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