ESS

Electronic Services System – Coordinating Committee Meeting

Agenda

Web Conference

8711 Windsor Parkway, Suite 2
Johnston, Iowa

January 13, 2026

2:30 P.M. to 3:30 P.M.

- **Welcome and Introductions**
- **November 13, 2025 – ESS Coordinating Committee Meeting Summary – Approval**
- **ESS Election of Officers – Approval**
- **Contracts and Agreements**
  - **Employment of Software Developer – Approval**
  - **WordPress Pages Update - Visionary – Approval**
  - **Notification System Concept Direction – Approval**
- **Other Project Updates**
  - **Cost Sharing Credits and Maintenance Invoices**
  - **ESS Finance and Operational Practices Policy Update**
  - **ESS Director Search Activities**
  - **ESS Office Relocation Review Update**
- **Adjourn - Next Regular Meeting February 19, 2026**

ESS Coordinating Meeting
November 13, 2025

Attendance
ESS Coordinating Committee Members
Ann Ditsworth, Dickinson County Recorder
Travis Case, Grundy County Recorder
Jolynn Goodchild, Plymouth County Recorder
Jamie Stargell, Adams County Recorder
Natalie Steffener, Des Moines County Recorder
Melissa Bahnsen, Cedar County Recorder
Dillon Malone, Iowa Title Guaranty
David Erickson, Dentons Davis Brown
Eric Sloan, Boone County IT

Other Participants
Erin Canfield, Boone County Recorder
ReNae Arnold, Dallas County Recorder
Megan Clyman, Davis County Recorder
Stacie Herridge, Story County Recorder
Nancy Booten, Lee County Recorder
Mary Ward, Cass County Recorder
Jesse Huisman, Grundy County IT/ GIS Director
Carolyn Siebrecht, Linn County Recorder
Andrew Moats, Pottawattamie County Recorder
Kisha Martin, Ringgold County Recorder
Patty Hinners, Scott County Recorder Staff
Bob Rafferty, Rafferty Group
Nick Laning, Rafferty Group
Paul Drey, Brick Gentry
Anthony Bengston, guest

Phil Dunshee, Iowa Land Records
Lisa Long, Iowa Land Records
Kristen Delany-Cole, Iowa Land Records
Samantha McMahon, Iowa Land Records

Welcome
A hybrid meeting of the ESS Coordinating Committee was held via web conference and at the ESS office in Johnston. Chair Ann Ditsworth called the meeting to order.

ESS Coordinating Committee Meeting Summary
The summary of the ESS Coordinating Committee meeting on August 19, 2025, was reviewed. Travis Case made a motion to approve the meeting summary. Jamie Stargell seconded. The motion was approved.

2026 ESS Meeting Schedule
The Committee reviewed proposed meeting dates for 2026 on February 19, May 14, August 13, and November 12. Travis Case made a motion to approve the 2026 regular meeting dates, and Jamie Stargell seconded. The motion was approved.

Committee Terms of Office
The following known nominations were discussed for the expiring terms in Districts 2, 4, and 6. The positions for the ICRA Executive Board representative, the ICIT representative, and other stakeholder positions were also discussed.

- District II – Denise Baker (Wright Co.)
- District IV – Kisha Martin (Ringgold Co.)
- District VI – Melissa Bahnsen (Cedar Co.)
- Stakeholder – Dillon Malone (Title Companies)

Financial Reports
2025 YTD Reports
The Profit & Loss (P&L) statement for 2025 YTD showed ESS's budgeted income of $1,518,251.24 against budgeted expenses of $1,254,490.76, resulting in budgeted net income of $263,760.48. The revolving income for the period was $30,617,765.57, contributing to a gross income of $32,136,016.81. Revolving expenses were $30,621,992.69 with total expenditures of $32,098,101.11. The total net income for 2025 YTD came in at $37,915.70.

The Balance Sheet indicated total assets and liabilities at $2,838,542.93, with $711,700.88 specifically residing in the Bankers Trust settlement account and $1,236,032.98 in the Bankers Trust money market account. It is important to

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note that, given accrual-based accounting, the balance sheet figures for the Bankers Trust settlement account are higher than the actual bank account balance. The settlement account amount on the Balance Sheet represents unreconciled transactions in the ESS accounting software as of September 30, 2025.

Natalie Steffener moved to approve the YTD Financial Reports and Travis Case seconded the motion. The motion was approved.

October Metrics Review
E-Submission activity for October 2025 was reported to be above 2021 numbers for the second time this year. For reference, 2021 was a high-performance year for E-Submission due to the need to go digital during the pandemic and changes in the economy. Given the sustained rise in recording activity in 2025, financials have been more predictable, though a steady decline is expected in the winter months going into 2026. To maintain a realistic budget, the 2026 E-Submission income projection was based on a conservative rate and is not reliant on the same high E-Submission trends seen in recent months.

LEGISLATIVE UPDATE
Nick Laning of the Rafferty Group provided an update on preparations for the 2026 legislative session. The Rafferty Group will represent both the Iowa County Recorders Association and Electronic Services System. He reported on recent changes in legislative committee leadership and described efforts to reconnect with returning legislators and share information with newly appointed members about county recording responsibilities. He also discussed the Department of Government Efficiency (DOGE) report, which included a recommendation to merge the offices of County Recorder and County Treasurer.

The expectation going into next year includes a continued debate on the consolidation of county offices and the need to strengthen resources for the recorder's office. Nick and the ESS Project Manager shared that ESS plans to advocate for a fee increase while highlighting the essential role of recorders and Iowa's land record management system.

CY 2025 Final Budget Amendment
The Project Manager provided a summary of a proposed budget amendment. A detailed spreadsheet with the recommended amendments to the 2025 budget was presented to the Committee. Adjustments to the revenue included projected income brought in from the Bankers Trust Money Market Account, as well as the discontinuance of income that was associated with the On-Demand payment services for Linn County.

Several expenditures were expected to change during the remainder of 2025. Costs have been added to make end-of-year purchases to refresh the computer equipment used by the ESS administrative team. Additional costs were projected to account for benefits based on the elections made by ESS employees during the recent change in human resource service providers.

Resources have been added to the Technical Operations budget in anticipation of efforts to fill a vacant software development position. This includes compensation for the position and the purchase of a computer and equipment. Resources for technical consulting, associated with a migration to a different Linux operating system, are included but reduced to reflect the hours of recorded work completed on the project. Other minor adjustments are recommended to reflect the timing of certain expenditures for local maintenance and software license renewal.

Most changes were adjustments from budgeted to actual figures and reflected a projected net income increase of more than $85,000 due to increased E-Submission activity. This created a new estimated total net income of $316,323.41. Overall revenue was estimated to increase by $64,814.85, while expenses are projected to decrease by $20,389.83.

Travis Case moved to approve the 2025 budget amendment and Jamie Stargell seconded. The motion was approved.

Transfers to Reserve Funds
With overall revenue in 2025 exceeding expectations, the opportunity to allocate resources to the appropriate reserve accounts was proposed for specific uses such as software development and redaction services. It was reported to the Committee that resources to make payments to local service providers and to maintain cash flow for day-day operations were taken into consideration for the proposed transfer to reserve funds.

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The Project Manager proposed to increase the Software Development & Equipment Maintenance Reserve funds to $450,000.00 from $327.307.02 and to increase the Redaction Reserve to $50,000.00 from $39,945.22.

The reasoning for this suggested change is because additional software development and back file redaction activity is expected in 2026. Also, ESS maintains a large reserve so that counties do not experience a lapse in distribution due to a holiday or other possible logistical roadblocks. ESS maintains a conservative approach to finances and assumes next year's income may not reflect the same activity as in 2025.

Jolynn Goodchild moved to approve the transfer to reserve funds and Jamie Stargell seconded. The motion was approved.

CY 2026 Budget with Amendment
A proposed budget for calendar year 2026 was presented to the Committee. While recording activity has been consistent, expenditures are expected to be higher than in 2025. This is primarily due to personnel changes, the need for new office space and general inflation. Income is projected to be $1,947,704.00. Expenditures are projected to be $1,917,912.00. As a result, projected net income in 2026 is expected to be $29,792.00.

Notable components of the proposed budget in revenue include the income from Point-of-Sale activities that are expected to decline due to cyclical changes in licensing activities. Income from recording activities is projected to be stable, but ESS aims to be prepared for changes in the economy. The switch in the cycle for maintenance activities from a fiscal year to a calendar fiscal year will result in a noticeable one-time adjustment in revenues and expenditures.

Key points from the budget for expenditure include the hiring of a new administrator of the Electronic Services System. Additionally, inflationary increases are expected for insurance, software licensing, and operations. In the future, there is an expected increase in monthly data center and hosting costs due to changes in licensing costs for VMware and other software used by ESS and Iowa Land Records. The possibility of filling a software developer vacancy will have a noticeable impact on the budget but will substantially enhance the internal development team's ability to improve ILR systems and provide timely customer support services. The Committee was also informed of a likely change in office space for the ESS and ILR operations in March of 2026, which is reflected in the budget.

Education and outreach activities are limited and focused on maintaining basic operations. Resources are allocated for ESS leadership to attend two PRIA conferences in 2026. However, membership in the Mortgage Industry Maintenance Organization will be allowed to expire. Employee elections for healthcare benefits will have a noticeable impact on human resource expenditures. Resources accumulated in 2025 and placed into reserve will enable ESS and ILR to make other changes and enhancements to its primary software applications.

Travis Case moved to approve the CY 2026 budget with the proposed amendment and Jamie Stargell seconded. The motion was approved unanimously.

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Contracts and Agreements
Brick Gentry CY 2026 Engagement
The Committee reviewed the proposed 2026 engagement agreement with Brick Gentry, which continues the firm's long-standing role as legal counsel for ESS and ILR. The proposal maintains the existing monthly retainer rate for base legal services, ensuring consistent access to counsel without changes to cost or scope. No modifications to the contract structure were recommended.

Jamie Stargell moved to approve the Brick Gentry agreement and Travis Case seconded. The motion carried.

Connectify Retirement 401K Plan
The Accounting Coordinator and Account Manager presented a review of the Connectify retirement plan, which was delayed in the transition under a new provider. Once the transfer is complete, ESS employees will have access to a similar plan and vesting options as they had before.

Jolynn Goodchild moved and Natalie Steffener seconded. The motion was approved.

Linux Migration and 1099 Agreement Extension
The Committee reviewed a proposed extension through March 31, 2026, of development and technical support services related to the ongoing Linux migration project. This work includes continued collaboration with former technical lead Kelly Wallace, who has been assisting with system transitions and backend support. The extension ensures stability during critical migration milestones and provides continuity for the ESS operating system until development work is transitioned to a fully staffed development team.

Jamie Stargell moved to approve the extension and Travis Case seconded. The motion carried.

Cost Sharing Credits and Maintenance Amendments
The Committee reviewed a recommended policy change for how cost sharing credits are assigned. The policy establishes a standardized method for estimating credits as soon as possible after the close of the calendar year. This approach improves predictability while maintaining oversight through regular reporting. Additionally, the committee was asked to approve amendments to the local service provider maintenance agreements which would provide a three-month extension of the deadline for completing developments for the county upload API. This was recommended to provide some additional flexibility for participating service providers during the API update cycle.

Jamie Stargell moved to approve the updated cost-sharing policy and maintenance extensions. Jolynn Goodchild seconded and the motion was approved.

ILR WordPress Landing Pages Update
The Communications Coordinator and Project Manager provided an overview of the proposed ILR website update project, including a request for information to guide the web developer vendor selection process. Discussion among Committee members raised questions about how the redesign might support future work on a property notification system. It was clarified that the website update is not directly related to any notification system and can proceed while broader discussions continue.

The primary website landing pages had not been updated since 2019 and posed several functional concerns. The Committee supported the recommendation to move forward with the website update and to form an evaluation committee to select an appropriate WordPress development service provider.

A motion to approve the project and establish the working group was made by Jamie Stargell and seconded by Travis Case. The motion passed.

Linn County 28E Agreement Update
The Committee received an update regarding the status of the 28E Agreement between ESS and Linn County. No action was requested. Linn County had discontinued use of the ESS on-demand payment system. However, ESS would continue to have access to the code which had been developed for the original Linn County registration renewal system.

ESS Director Search and Developer Search Activities
The Project Manager recommended that the Committee authorize budget flexibility to boost job posts on platforms such as LinkedIn and Indeed, and to retain a recruiter if needed to identify candidates. Potential expenses may also include travel reimbursement for interviews and site visits.

A motion to authorize the formation of a recruitment committee and to allocate resources from the software and unrestricted reserve accounts for recruitment activities was made by Travis Case and seconded by Natalie Steffener. The motion passed.

ESS Office Relocation Review Update
The Account Manager informed the Committee that the ILR should identify alternative office space. Currently, office space is included in the Project Manager’s contract which is scheduled to end on March 31, 2026. The review included projected timelines and early planning considerations based on current office space options in the area. No action was requested at this meeting, and more information will be provided in 2026.

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Policies and Standards
The Project Manager provided updates on multiple policy and standards initiatives underway. Proposed revisions to Chapter 2 in the ESS Policies and Procedures manual were discussed. The revisions would address circumstances when a service provider was not a participant in a maintenance agreement or when a county was not a member of the ESS 28E agreement. Background information about expected and required data elements was also provided to the Committee.

Finance Subcommittee Policies and Practices Review
The Committee was informed of a discussion with the ESS Finance Subcommittee concerning ESS financial policies and practices. The Subcommittee is expected to consider ideas and suggestions at their meeting in December. Members of the ESS Coordinating Committee were invited to offer their ideas and suggestions as well by contacting Stacie Herridge, the ESS Finance Subcommittee Chair.

Adjournment
The meeting was adjourned. The next meeting of the ESS Coordinating Committee is scheduled for February 19, 2026.

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2026 ESS Committee Calendar

ESS Committee - Regular Start Time – 10:00 AM

ESS Coordinating Committee

Thursday, February 19

Thursday, May 14

Thursday, August 13

Thursday, November 12

ESS COMMITTEE

District I	Travis Case	Grundy	1/01/25 -12/31/26
District II	Denise Baker	Wright	1/01/26 -12/31/27
District III	Jolynn Goodchild	Plymouth	1/01/25 -12/31/26
District IV	Kisha Martin	Ringgold	1/01/26 -12/31/27
District V	Natalie Steffener	Des Moines	1/01/25 -12/31/26
District VI	Melissa Bahnsen	Cedar	1/01/26 -12/31/27
Large Co.	Julie Haggerty	Polk	1/01/25 -12/31/26
Exec. Bd.	Jamie Stargell	Adams	1/01/26 -12/31/26
ICIT	Jesse Huisman	Grundy	1/01/26 -12/31/27
Stakeholder	David Erickson	Real Estate Attorney	1/01/25 -12/31/26
Stakeholder	Dillon Malone	Title Companies	1/01/26 -12/31/27
Stakeholder	Vacant	Financial Institutions	1/01/26 -12/31/27

CONNOR LINN

Minneapolis, MN •

EXPERIENCE

Software Engineering Intern May 2022 - Aug 2022
Empirical Foods | Sioux City, IA

I developed numerous applications, helped organize and manage company-wide file migration, and took on the responsibility of solutions architect to increase work efficiency for all departments.

- **Independence -** The biggest lesson I learned while working here is that when I come across a problem, rather than asking someone for help, it's more beneficial to figure out how to solve it myself.
- **Problem Solving -** I also learned that the key with a majority of coding problems is that not many have known answers. Most of the time, it's more important that you know to solve issues rather than having previous knowledge on that particular topic.

Software Developer June 2023 - Present
Emerson | Minneapolis, MN

I entered the company out of college as a junior developer where I really got a good grasp on what it means to be a software engineer in the real world. Here I worked on the CHRONUS team where I gained experience in historians and data analytics.

- **Work Ethic -** I found that in practice having a good work ethic and a drive to always accomplish the task at hand far outweighed those with more knowledge or experience. I hate to stay idle and constantly try to better myself so I can be more efficient.

PROJECTS

List of Personal/Academic Projects

- **S&P 500 futures trading project.** I was part of a project based around using quantitative trading to trade S&P 500 futures contracts. This was a great project for learning how to work as a cohesive team. The coding team had to work side by side with a Strategy Analyst to implement the correct concepts into the program, as well as optimizing it for Ideal efficiency. Through this I have gained a very strong knowledge of both coding and the financial Industry.
- **Data Pipeline.** I worked on a project for converting data from one Historian to another. This was challenging because the remote server was single threaded and slow. I wrote a data exporter in C++ to efficiently move and format the data as quickly as possible. This was a large project that vastly improved my knowledge of C++ and data structures.

EDUCATION

Iowa State University | Bachelor of Engineering in Software Engineering May 2023

- *Member*, Python Development Club; *Member,* Computer Science and Software Engineering Club; *Member*, Iowa State Chess Club; *Member,* Iowa State Billiards Club

SKILLS

C++ | Python | Java | JavaScript | PostgreSQL | Cassandra | SQL | React | Node.js | C | Git | Database Management | Computer/Software architecture | Microsoft Office 365 | Power Automate

Electronic Services System
8711 Windsor Parkway, Suite 2
Johnston, IA 50131

January 2, 2026

Connor Linn

Dear Connor,

On behalf of the Electronic Services System, I wish to confirm an offer of full-time employment to you for the position of Application Developer and Support Coordinator. This letter will outline the details of your proposed employment.

Your first day of work will be Monday, January 26, 2026. This position is exempt. You will report to Phil Dunshee. ESS Technical Lead Merna Addison will be your direct supervisor. Your compensation will be $94,000.00 per year earned and paid on a bi-weekly basis. We are also pleased to offer you a one-time sign-on bonus of $1,500 (less applicable taxes and withholdings). This bonus will be paid on the first regular payroll date following your successful completion of thirty (30) days of employment, provided you remain employed and in good standing through that date. This offer of employment is contingent upon satisfactory results of a pre-employment background check, acknowledgement and acceptance of the ESS Employee Handbook (updated February 15, 2024), and the formal approval of our governing board.

The following details are intended to outline the general elements of the position offered:

- **Hours**: Standard business hours are Monday – Friday, 8:00am to 5:00pm.
  - You may be authorized to work remotely subject to ESS policy.
- **I9**: On or before your first day of employment, please be prepared to provide appropriate documentation to complete the Form I9, which validates your eligibility for employment in the United States.
- **Pay Period:** Pay periods are bi-weekly, every other Friday. Customary and required local, state, and federal taxes and employment related deductions, as applicable, will apply.
- **Benefits:** You will be entitled to participate in all general employee benefit plans available to full-time employees effective on the 1st of the month following your date of employment. Benefits include health, dental, vision, group life, short-term disability, and other ancillary products. Specific details regarding benefit options will be provided during your first week of employment.
- **Paid Time Off:** You will be eligible for Paid Time Off (PTO), and you will accumulate PTO hours each pay period up to 120 hours per year. You will be eligible to earn up to 160 hours per year after three years of employment. The Electronic Services System also observes ten paid holidays each year.
- **At Will:** Your employment with The Electronic Services System is 'at-will' which means that either you or The Electronic Services System may terminate the relationship at any time. The contents of this letter should not be construed as a contract. To officially accept this offer, please sign one copy of this letter and return it to my attention at your earliest convenience.

We are looking forward to working with you and feel this will be a mutually rewarding relationship.

For the Electronic Services System

Phil Dunshee
Project Manager

I, Connor Linn, accept the offer of employment. I understand that my employment with The Electronic Services System is considered "at will", meaning that either The Electronic Services System I may terminate the employment relationship at any time with or without cause or notice.

Accepted by: eSigned by: Connor D Linn 01/05/2026 @ 23:29 UTC Date: 01/05/2026

Signature Certificate

Document completed by all parties on 01/05/2026 @ 17:29 CST

Document ID: 695c49571b00fb001f2d4e84

Sender information

Sent On:	01/05/2026 @ 17:29 CST
Timezone:	Central Standard Time
Sender:	Connor D Linn linnconnor@gmail.com
Sender IP:	

Signer	Signature
Connor D Linn linnconnor@gmail.com Received: 01/05/2026 @ 17:29 CST Viewed: 01/05/2026 @ 17:29 CST Signed: 01/05/2026 @ 17:29 CST	Connor D Linn

eSign

Project Overview

The goal of this project is to deliver a modern, secure, and accessible website for Iowa Land Records (ILR) that replaces outdated structures and manual content processes with a streamlined, user-friendly content management system. The refreshed website will improve navigation, clarity, and usability for public users and county recorders while empowering ILR staff with efficient tools to manage content updates independently.

This website refresh focuses on enhancing user experience, accessibility compliance, and operational efficiency while establishing a stable and flexible foundation that supports future growth, integrations, and long-term sustainability.

Visionary recommends building the refreshed website on a WordPress content management system. This approach aligns with ILR's existing technical ecosystem, supports internal hosting requirements, and provides long-term stability and extensibility. Visionary will leverage proven WordPress frameworks and fully licensed plugins to support role-based access, structured workflows, accessibility compliance, and future integrations (such as CRM, and messaging tools). No proprietary or restrictive platforms will be utilized, ensuring ILR maintains full ownership and control of the website.

Website Features & Scope

Technical & Platform Requirements

- WordPress CMS
- Secure HTTPS/SSL configuration
- Staging and production environments
- Application security hardening and vulnerability scanning

Design & User Experience

- Simple, modern, and visually appealing design aligned with ILR branding
- Mobile-first, responsive design across devices
- Improved information architecture and navigation
- Reusable templates and structured content components

Accessibility & Compliance

- WCAG 2.1 AA–compliant design and development
- Color contrast validation
- Keyboard navigation and screen reader support
- Developer-led accessibility testing and remediation

Content Management & Staff Tools

- Intuitive WordPress admin interface for non-technical users
- Role-based permissions (Site Administrators, Editors, Recorder/County Staff, Public)
- Content preview, approval, and publishing workflows
- Version history and audit trails
- Migration of approximately 35 active public pages

Role-Based Access & Authentication

- Secure Recorder's Resource Hub
- Role-based content visibility using membership controls
- Architecture designed to support future integrations, including potential CRM and other system expansions.

Core Site Features

- Announcements, alerts, and notification banners
- Events and calendar functionality
- Integrated forms for contact, surveys, and submissions
- Enhanced site search
- Advertising and banner management modules
- Continued support for Gravity Forms and Mailchimp integrations

Custom Development Components

Below are the key components that ensure the refreshed ILR website is modern, accessible, and aligned with ILR goals.

Required Components

Modern, Accessible WordPress Website

- Fully redesigned WordPress site reflecting ILR's mission and values.
- Mobile-first responsive design, WCAG 2.1 AA compliant.
- Intuitive navigation for public users, recorders, and staff.

Role-Based Access & Authentication

- Secure Recorder's Resource Hub with member-only areas.
- Role-based content access using WordPress membership tools (e.g., MemberPress).
- Architecture designed to support future integrations, including potential CRM and other system expansions.

Content Management System (CMS)

- WordPress CMS with intuitive admin interface for non-technical staff.
- Reusable page templates and structured content components.
- Preview, approval, and publishing workflows.
- Version history and audit logs.
- Ability to manage images, video, PDFs, forms, and external embeds.

Navigation & Layout Enhancements

- Full audit and optimization of menus, click paths, and site structure.
- Wireframes and design templates for all major pages.
- Streamlined presentation of critical content sections.

Announcements, Alerts, & Messaging

- Modules for system-wide announcements and alerts.
- Rotational banner management for news, events, or maintenance messaging.
- Staff-accessible notifications for Recorder Resource Hub updates.

Forms & Data Capture

- Integration of Gravity Forms for contact, surveys, event registration, and other submissions.
- Support for advanced calculator fields for tools such as the Transfer Tax Calculator.

Events & Calendar

- Event management plugin for webinars, trainings, and county recorder events.
- Integration with forms and RSVP workflows.

Advertising & Visual Enhancements

- Ad and banner management tools for rotating placements.
- Placeholder for refreshed photography assets integrated throughout key pages.

Search Functionality

- Enhanced site search powered by a plugin like SearchWP.
- Supports robust indexing of public and private content areas.

SEO & Analytics Integration

- Yoast SEO configuration for metadata, sitemaps, and page optimization.
- Tag management and analytics integration to track usage and performance.

Training, Documentation, & Staff Support

- Tutorials, tooltips, and onboarding materials for staff/admin users.
- Post-launch training and documentation covering content workflows, templates, and updates.

Content Migration & QA

- Migration of approximately 35 active public pages.
- Full QA testing for accessibility, responsiveness, and navigation.
- Validation of all restricted Hub content and forms.

Web Application Design and Development

The initial design and Visionary will deliver a complete, fully functioning web application built for Iowa Land Records (ILR) on a WordPress platform. The project will be completed by **June 2026**, assuming timely delivery of materials, approvals, and inputs from ILR. Any changes beyond the agreed scope may result in additional charges.

Visionary will continue providing technical support after launch. Future enhancements will be estimated and billed separately.

Creation of Main Web Application

This estimate covers all required features across the project phases, including:

- Discovery, requirements gathering, and regular project meetings
- Theme selection
- Back-end development, plugin setup, and site structure
- Content migration (~35 pages) and CMS configuration
- Accessibility testing (ADA/WCAG 2.1), mobile responsiveness, and SEO optimization
- Documentation, training, and reference materials
- Final site launch

Cost Summary & Payment Terms

Phase 1: Discovery & Website Audit

- **Deliverables:** Audit report, approved wireframes, style guide
- **Timeline:** Jan 28 – Feb 2026
- **Estimated Cost:** $6,960

Phase 2: Development & CMS Implementation

- **Deliverables:** Staging site, CMS setup, internal review
- **Timeline:** Feb – May 2026
- **Estimated Cost:** $22,270

Total Estimate for Web Application: $29,230

Payment Terms

- A **25% retainer ($7,307.50)** will be due upon contract signing to kick off the project.
- The **remaining balance** will be invoiced monthly as work is completed.

Optional Items

Phase 3 – Ongoing Hosting & Support

- **Services:** Secure hosting, server monitoring, backups, post-launch training
- **Cost:** $480/year

Phase 4 – Optional Enhancements / Future Integration

- **Services:** Custom feature updates, CRM or live messaging modules
- **Rate:** $120/hour

ILR Website Project Timeline

The final project timeline will be confirmed during initial meetings to gather system requirements. Any adjustments to the schedule during development will be communicated promptly.

Our goal is to have the redesigned Iowa Land Records (ILR) WordPress site—covering all public-facing pages and key user workflows—fully functional and ready for public access in June 2026.

Updates to additional pages, refinements based on feedback, and follow-up tasks will occur after the initial launch, supported through Visionary's ongoing technical services. Future enhancements or optional features will be scoped separately, with cost estimates provided at that time.

This timeline assumes timely communication between ILR staff and Visionary, as well as the delivery of all necessary content, integration information, and other materials before the design and development phases begin. Changes to the approach or delays in providing required input may affect the overall timeline and could result in additional costs.

Phase 1: Project Kickoff, Discovery & Website Audit

Timeline: January 28 – February 2026
Following the anticipated January 28 project launch, Visionary will begin with a structured discovery process to validate goals, confirm requirements, and evaluate the current ILR website. This work will align with ILR's content, navigation, and usability priorities outlined in the RFP.

Key Activities:

- Conduct a comprehensive audit of the existing ILR site, including:
  - Technical performance
  - Mobile responsiveness
  - ADA/Accessibility (WCAG 2.1 AA)
  - Content clarity, duplication, outdated pages
  - SEO and metadata
  - UX/navigation analysis for core user groups
- Deliver a prioritized audit report identifying issues, opportunities, and recommended solutions.
- Develop proposed site architecture and navigation updates based on analytics, audience roles, and RFP focus areas.
- Create initial wireframes for high-traffic pages (homepage, Recorder Directory, training resources, About/Accountability pages).
- Collaborate with both of us to confirm direction and refine the scope.

Outcome:
A clear, actionable roadmap— audit report, approved wireframes, style guide.

Phase 2: Development & CMS Implementation

Timeline: February – May 2026
(Activities will build directly on the outcomes of Phase 1.)

Visionary will design and build the refreshed ILR WordPress website with improved navigation, modernized layouts, content enhancements, and new messaging features.

Task 1: Design & Theme Framework

Timeline: February 2026

- Review 2–3 WordPress theme frameworks compatible with ILR's current hosting and RFP requirements.
- Present design direction, visual concepts, and theme recommendations.
- Customize the selected theme to support ILR branding, accessibility, mobile optimization, and future scalability.

Task 2: Development & Feature Buildout

Timeline: February – May 2026

- Configure the WordPress environment, including role-based permissions, content workflows, and staging/test environments.
- Implement improved navigation, modernized page layouts, and updated templates using reusable components.
- Build or configure required features, including
  - Messaging/announcement module
  - Recorder Directory companion enhancements (e.g., Search Tips
  - Advertising modules with rotational controls
  - Content audit recommendations (consolidated pages, new structure)
  - Placeholder images for future photography refresh
  - Integration with Gravity Forms, Mailchimp, and other ILR tools
- Ensure full mobile responsiveness and accessibility compliance.

Task 3: Content Migration, QA & Testing

Timeline: April – May 2026

- Migrate content from approximately 35 active public pages.
- Validate updated pages against ILR's content strategy, navigation goals, and usability benchmarks.
- Conduct full QA testing for:
  - Accessibility
  - Mobile and desktop performance
  - Role-based access and restricted Hub content
  - Search and E-Submission link paths
- Provide access to the staging site for ILR review and feedback.

Task 4: Final Review, Adjustments & Pre-Launch Preparation

Timeline: Early June 2026

- Apply final content edits, styling adjustments, and technical refinements.
- Validate analytics configuration, redirects, and metadata cleanup.
- Complete final accessibility and browser testing.

Outcome:

A redesigned, mobile-optimized, accessible WordPress site with improved navigation, refreshed visuals, and enhanced messaging features—ready for ILR approval and launch.

Phase 3: Launch & Post-Launch Support

Timeline: June 2026
(Aligned to the RFP's June 2026 target completion date.)

Key Activities:

- Launch the live ILR website under ILR's hosting environment.
- Perform live-site QA and monitor stability, speed, accessibility, and integration.
- Provide staff training on:
  - Content management workflows
  - Using the messaging/announcement module
  - Managing advertising placements
  - Updating photos and page templates
- Deliver any necessary documentation covering system updates, edit instructions, and administrative tasks.

Outcome:
A successful website launch with ILR staff fully trained and equipped to manage content independently.

Phase 4: Optional Ongoing Hosting, Maintenance & Support

Timeline: Beginning June 2026 and Ongoing
Key Activities:

- Maintain server environment and WordPress updates (core, theme, plugins).
- Monitor uptime, security, accessibility, and performance.
- Provide backups and restore points.
- Support future enhancements, CRM preparation, expanded messaging tools, and other updates.
- Offer hourly support as needed for content updates, features, or design improvements.

Outcome:
Long-term stability, security, and continuous improvement of the ILR website.

Iowa Land Records (ILR) Website Refresh – Statement of Work (SOW)

Client:
Iowa Land Records (ILR)
8711 Windsor Pkwy Unit 2
Johnston, IA 50131
Phone: 515-971-3598

Service Provider:
Visionary Services, Inc.
300 E Locust St, Suite 250
Des Moines, IA 50309
sarah@visionary.com
515-369-3545 ext. 154
www.visionary.com

Project Overview

Thank you for the opportunity to submit this Statement of Work for the Iowa Land Records (ILR) website refresh and content management modernization project. Visionary proposes to redesign, streamline, and strengthen **iowalandrecords.org** with a modern, mobile-friendly, accessible, and intuitive user experience.

With over 30 years of experience developing secure, government-grade web applications, Visionary specializes in scalable WordPress environments that support role-based access, structured content management, and complex multi-audience needs. This project will deliver a future-ready platform that improves clarity for the public, empowers ILR staff, and supports Recorders statewide.
Target Completion: June 2026, followed by a smooth launch and transition for internal teams.

Scope of Work

Visionary will deliver a complete, fully functioning WordPress website for Iowa Land Records, including design, development, accessibility compliance, content migration, and staff training.

In Scope

- Modern, mobile-first WordPress website redesign
- WCAG 2.1 AA accessibility compliance
- Streamlined navigation and information architecture
- Role-based content access and Recorder Resource Hub
- Integrated announcements, alerts, and advertising modules
- Full content migration (~35 active pages)
- CMS configuration and staff training

Out of Scope

- Custom CRM or SSO integrations beyond foundational readiness

- Ongoing content entry post-launch (unless contracted separately)
- Third-party licensing or plugin fees

Project Assumptions & Dependencies

- ILR will provide timely access to content, branding assets, and systems.
- ILR stakeholders will review and approve deliverables within agreed timelines.
- Hosting environment, server credentials, and IT support will be provided by ILR.
- Any delays in inputs or approvals may impact timelines or costs.

Key Deliverables

- Fully redesigned, accessible WordPress website
- Simplified navigation and improved content clarity
- Role-based CMS environment with structured workflows
- Integrated announcements, alerts, and advertising tools
- Migrated content meeting accessibility standards
- Training materials and documentation

All website code, configurations, content, and documentation will become the sole property of Iowa Land Records upon project completion.

Project Phases & Timeline

Phase 1: Discovery & Website Audit

- Timeline: January 28 – February 2026
- Deliverables: Audit report, wireframes, style guide
- Estimated Cost: $6,960

Phase 2: Development & CMS Implementation

- Timeline: February – May 2026
- Deliverables: Staging site, CMS configuration, internal review, transfer of staging site to ILR servers
- Estimated Cost: $22,270

Phase 3: Launch & Post-Launch Support

- Timeline: June 2026
- Deliverables: Live site, QA validation, staff training, documentation
- Estimated Cost: Included

Acceptance Criteria

Deliverables will be formally accepted by ILR as follows:

- **Phase 1:** Audit report and wireframes to be reviewed and approved by the ILR project team.

- **Phase 2:** Visionary will create a Staging site for ILR review. Once approved, it will be transferred into ILR's Staging environment for evaluation and formal approval of functionality, accessibility, and design.
- **Phase 3:** The Staging site will be promoted to the live site upon ILR's approval, following successful QA, completion of training, and review of all documentation.

Accessibility & Compliance

Visionary will deliver a website that meets WCAG 2.1 AA accessibility standards at launch. Accessibility validation includes color contrast testing, screen reader testing, semantic markup review, manual code inspection, and documented remediation.

Content Management System & Technical Approach

- WordPress CMS (latest stable version)
- Role-based permissions and member-only areas
- Staging and production environments (provided by ILR)
- Continued support for Gravity Forms and Mailchimp if desired
- SEO, analytics, and performance optimization
- Architecture designed to support future integrations, including CRM, SSO, and automated communications

Client Responsibilities

ILR will provide:

- Timely access to content, analytics, systems, and key stakeholders
- Branding assets, existing materials, and photography coordination
- Review and approval of deliverables within agreed timelines

Delays may impact schedule or cost.

Fees & Payment Structure

Item	Estimated Cost
Phase 1 – Discovery & Audit	$6,960
Phase 2 – Development & CMS	$22,270
Photography Refresh	Out of Scope
Total Estimate	$29,230

Hourly Rate for Additional Work: $120/hour

Payment Terms:

- **Retainer:** 25% ($7,307.50) due upon contract signing to kick off the project.
- **Ongoing Invoicing:** Remaining balance invoiced monthly as work is completed.
- **Detailed Billing & Reporting:** During the initial phase covering the retainer, detailed bi-weekly reports (or as agreed) will include:
    - Hours worked per team member

    - Specific tasks completed
    - Allocation of time to project phases or deliverables
    - This ensures transparency and clear tracking of utilization for the down payment period.
- **Payment Expectations:** Ongoing invoices will continue to reflect detailed reporting until the parties agree such reporting is no longer necessary.

Risk Management

Risks & Mitigation:

- Delay in content delivery → structured content workbook and regular check-ins
- Scope expansion → milestone approvals and written change orders
- Accessibility issues → ongoing WCAG testing and remediation
- Third-party integration delays → modular design ready for future integrations

Change Control: Any changes to scope, timeline, or cost must be documented in a written change order approved by both parties.

Project Communication

- Weekly status updates via email or Teams meetings
- Project manager as primary contact for ILR
- Milestone-based approvals for all phases

Agreement & Contract

1. AGREEMENT**.** This is an agreement between **Visionary Services, Inc.** ("VSI") and **The Electronic Services System, doing business as Iowa Land Records** ("Client") to provide website design services, including but not limited to planning, design, coding, and publication of a website according to the specifications in the *Project Details* listed above.

(a) Commencement **Date:** TBD (*will be based on contract execution date)
(b) Estimated **Completion Date:** June 2026
(c) Project **Name:** Iowa Land Records Website Refresh

2. PRICE**.** See *Cost Summary* above. Overall cost estimate is $29,230.00

Payment Terms:

- A 25% retainer ($7,307.50) is due upon contract signing to kick off the project.
- The remaining balance will be invoiced monthly as work is completed.
- Detailed Billing & Reporting: During the initial phase of the project covering the retainer fee, detailed billing reports will be provided on a bi-weekly basis (or as otherwise agreed). These reports will include:
    - Hours worked per team member
    - Specific tasks completed
    - Allocation of time to project phases or deliverables
    - This level of transparency ensures clear tracking of utilization for the down payment period and establishes accountability.
- Payment Expectations: Ongoing invoices will reflect the detailed reporting described above, and the parties will review utilization of time until the need for such detailed reporting is reduced or discontinued by mutual agreement.

3. SITE DESCRICPTION AND DELIVERABLES. See *Project Details* listed above for details.

Any alterations or deviations from the above specifications involving extra fees or costs will be executed only upon written orders signed by both parties, and will become an extra charge over and above the estimate provided. Should the Client require additional work beyond the specifications above, the Client agrees to pay Visionary an additional $120.00 per hour for project administration, $120.00 per hour for design and $120.00 per hour for development.

4. DESIGN PROCESS. Client will provide the content of all Web pages (text and graphics) in an acceptable electronic format. Content that must be re-keyed or scanned may be subject to additional fees. The process for the creation of visuals, such as graphics and page designs, consists of VISIONARY providing drafts and asking for feedback from the Client; the feedback is then used to produce another draft. This estimate includes no more than two (2) rounds of this process for each design element. Additional rounds shall be additional charges at VISIONARY'S standard hourly rate.

5. PAYMENT**.** Upon signing this Agreement, Client will be invoiced in monthly installments, based on the estimated project timeline:

*If it is determined additional items are requested outside the original scope, Visionary will provide addendum to be approved by Client. Final invoice will reflect any additional costs approved and incurred during project.

Interest shall accrue monthly at a rate of 1.5% until the balance is paid. Visionary reserves the right to remove webpages from viewing on the Internet until final payment is made. If collection activities become necessary, the Client agrees to pay all fees and costs necessary to collect the fee including reasonable attorney's fees and court costs.

6. COMPLETION DATE. Visionary and the Client must work together to complete the website in a timely manner. To avoid additional fees or delay of the completion date, Client must supply Visionary the complete text and graphics content for the website within the time frame assigned by Visionary. Any alterations or deviations from the above specifications may delay the anticipated completion dates. The Client acknowledges these dates are anticipated dates of completion and are not guaranteed dates of completion.

7. COPYRIGHT AND TRADEMARKS. Client unconditionally guarantees that any elements of text, graphics, photos, logos, trademarks or other artwork furnished to Visionary for use in the website are owned by the Client, or that the Client has permission from the rightful owner to use each of these elements and will hold harmless, protect and defend Visionary, its principals, employees and contractors from any claim or suit arising from the use of such elements furnished to the Client. Client is solely responsible for the editorial content of the material included on its website.

8. INTELLECTUAL PROPERTY RIGHTS. All pre-existing intellectual property, tools, frameworks, libraries, templates, scripts, methodologies, processes, and code snippets ("Developer Materials") used or incorporated by Visionary in the development of the website or web application shall remain the sole and exclusive property of Visionary. To the extent any Developer Materials are incorporated into the Final Deliverables, the Client is granted a non-exclusive, non-transferable, perpetual license to use such Developer Materials solely as embedded within and necessary for the operation of Final Deliverables, and solely for the Client's internal business purposes.

Visionary shall retain all ownership rights to its proprietary tools, methods, and development processes. Nothing in this Agreement shall be construed to transfer ownership of Visionary's intellectual property to the Client. Upon full payment of all fees due under this Agreement, the Client shall own all rights, title, and interest in the final code, design elements, and content specifically created for the Client under this Agreement ("Final Deliverables"), excluding any Developer Materials.

Visionary reserves the right to reuse, modify, and repurpose any non-client-specific code, tools, frameworks, or methodologies developed during the project for other clients or internal purposes. Where applicable, Visionary will identify in writing any Developer Materials incorporated into the Final Deliverables to which the above license applies, which identification shall serve as notice that such materials remain Visionary intellectual property and are licensed, not transferred, to the Client.

9. CONFIDENTIALITY. Visionary will maintain the confidentiality of Client's source materials, technical and marketing plans, and all other sensitive information. Likewise, the Client agrees that it will not convey any confidential information obtained about Visionary to another party.

10. MAINTENANCE AND HOURLY RATE. Once site is designed, published and Client has indicated acceptance of completion of the website within the scope of the *Project Details*, additional site maintenance is billable at an hourly rate of $120.00 per hour for project administration, $120.00 per hour for design, and $120.00 per hour for development.

11. WARRANTIES AND LIABILITY.
Limitation of Liability: In no event shall either Party (including their respective officers, employees, shareholders, members, contractors, agents, and representatives) be liable to the other Party for indirect, special, incidental, or consequential damages, even if advised of the possibility of such damages.

Indemnification: Each Party, their successors and assigns (the “Indemnifying Party”) agrees to indemnify and hold harmless the other Party, its employees, officers, agents, representatives, contractors, shareholders, members, board members, and officials (collectively, the “Indemnitee”) from and against any and all claims or demands for liability, loss, damage, costs, expenses, or reasonable attorney’s fees to the extent that such claims arise out of or result from the negligent acts or omissions of the Indemnifying Party in connection with any undertaking arising out of or otherwise related to this Agreement.

Aggregate Liability: The aggregate liability of either Party for any claim, breach, or alleged breach arising under this Agreement shall be limited to the compensation amount specified in this Agreement or any subsequent extension period during which the claim arises.

Survival: This Section 11 shall survive the termination of this Agreement.

This Agreement is signed between the parties on this _____ day of _____, 20____.

_____
Client Authorized Signature

_____
Visionary Authorized Signature

_____
Client Authorized Title

_____
Visionary Authorized Title

_____
Client Email Address

☐ By checking this box, you allow Visionary to add this email address to the company's electronic communication distribution list. Visionary periodically sends out promotions, training tips, and other helpful communications to its clients. You may unsubscribe from these communications at any time.

ELECTRONIC SERVICES SYSTEM
8711 Windsor Parkway, Suite 2
Johnston, Iowa 50131

January 13, 2026

To: ESS Coordinating Committee

From: Phil Dunshee

Re: Notification System

In a May 15, 2025 memo a discussion was initiated concerning software development goals for the remainder of 2025. Specifically, we reported …

- "There are several things we wish to make progress on through the remainder of 2025.
    - Start work on the architecture of a statewide notification system.
    - Take initial steps to create the infrastructure for a "shielding" program including the creation of a new class of users who would be permitted to view shielded information and the creation a new classification for specified documents which would be designated for shielding protection."

During this same period, we invited two software development firms (We Write Code (WWC) and Lean Techniques (LT)) to prepare a preliminary estimate for these projects You may recall that ESS conducted a competitive selection process in 2021 to identify qualified software development firms in the Des Moines area. The contracts with both firms remain active even though we haven't engaged them recently.

While additional resources were allocated in the May 2025 budget amendment for the use of external software development services for tasks related to the creation of a notification system and a "Back the Blue" shielding program, that action was reversed in August due to uncertainties about whether the timing was right to pursue those objectives.

Because of positive E-Submission activity in 2025, the ESS Coordinating Committee was able to allocate an additional $123,000.00 to the Software Development and Equipment Maintenance Reserve Account (bringing to total amount to $450,000.00. The positive revenue trend continued through the end of the calendar year. Total net budgeted income for 2025 amounted to an estimated $430,362.45.

As you begin 2026, the opportunity to move forward with a new initiative using external development resources is present. Work could begin on the creation of a multi-county notification system. Resources could also be allocated toward other smaller projects in the ILR backlog, in addition to the WordPress update that is now underway.

There are two primary paths that could be followed regarding the notification system. The first is to in some way facilitate efforts by counties to connect with the notification systems offered by their local land record management system service providers. Some counties are already doing this. Other counties could do this also, as we are aware that those service providers have developed and are offering those products to their customers. An example of this is Harris-Solutions. Prior to the holidays we observed a demonstration of the Harris-Solutions product. ILR could potentially assist with the initial set up of these county-by-county systems in some way. A potential barrier to this is the likely ongoing expense that an individual county may have to incur.

The other alternative appears to be the creation of a statewide notification system administered through Iowa Land Records. Attached for your background is a description of a potential notification system that could be developed and administered by ILR.

You may recall that the Iowa Land Records team solicited cost estimates from our two external development vendors, WWC and LT, for any work to develop the framework for a notification system and a reformed “Back the Blue” shielding system. You may also remember that we had indicated in the second half of 2025 that sufficient resources had been accumulated to begin work on a notification system. Those conditions have improved as we have closed the ESS 2025 calendar year. As we begin 2026, it will be possible to restart the process for either facilitating an expanded county-by-county notification system or creating a statewide notification system based on party names.

From our point of view, a statewide notification system would have the benefit of serving multiple ESS county members at a lower cost to the individual counties, because it would be associated with the ILR land record search system which already exists. It would also provide a platform for enhancing notification services based on other types of transactional information.

Action Requested. The ILR team seeks your direction on the question about how to proceed with respect to the implementation of some form of notification system.

Alert Feature available as a part of a Name Search.

ILR Notification System Scaffolding Tasks

1. Create a notification search utility based on the name search (including the wild card functionality). The utility would run daily (overnight hours) searching for records which meet the following search criteria: one party name (person or organization or full name) and documents made public yesterday that have been recorded within the previous 12 months [the intent is to give notice on recently recorded documents only]. The search could be applied from one county to all 99 counties.
2. Create a table of party names [Party Name Table] (person or organization or full name created by users based on the ILR search application – the table would need to specify the party type). Each party name would be associated with a registered ILR search user (username and email address) and the table would include the date of creation. The table would permit up to 9 name profiles for each username. Note: The Party Name Table could potentially have 100,000 or more entries.
3. Link the Party Name Table to the notification search utility. The utility would search for every name in the table.
4. Persist positive search results to a Temporary Notification Table. When one or more positive results were found for a party name in the table, the following information would be persisted to a Temporary Notification Table for each matching document: The party name, the recording date, the document type, the county name, the document reference number, the Book, the Page, the unique code value assigned to the document, the associated username, the associated user email address.
5. Send Notification emails. Daily, a notification mail utility would generate 1 email (from @iowalandrecords.org) to each username in the Temporary Notification Table (prior to regular business hours). Each email would contain some standard text accompanied by the user's applicable information from the Temporary Notification Table. The information would be embedded in the body of the message as a table. Essentially, the message would notify the user that newly recorded documents were found matching the name criteria they provided. No email message would be generated to users with no matching results.
6. Archive the Notification Information. Information from the Temporary Notification Table will be appended to a Notification History Table. This table will archive the notification information and log the date of the entry. It would be used to display the notification history to the user through the ILR search interface. The purpose of the archive would be to provide the user with a record of matching documents and when they were recorded.
7. Create a Purge utility. When the archive process is completed, a utility would purge information from the Temporary Notification Table. Consideration may be given for a possible back up copy for a limited time.

ILR Notification System User Interface Tasks

1. Create interfaces for search users to set up notification profiles.
   Interface A. Create a page based on the Name Search page. Change the label from "Name Search" to "Notification Profile" or alternatively "Alert Profile".

   Display the following text below the name fields.

   > "Use the wildcard "*" character at the end of a character string in a name field if you are uncertain of spelling. Example: Peter* to find Peters, Peterson, or Petersen."
   >
   > Remove the date range element, as it would not be applicable to notification

functions.

Modify the County selection option to allow the user to select any number of multiple counties or “all” counties. (The regular search interface only allows for the selection of up to five counties.)

Change the “Search” button to be “Save Profile (or Alert)”. The result would be to save the profile with the name specified.

- Interface B. Create a Notification (Alert) Profile from a name search result. After running a name search, with the search results displayed, a user would be able to create a Notification Profile. For name search results only, a new button would be created and placed adjacent to the “Refine Search” and “Create Saved Search” buttons. The button would be labeled “Create Notification (or Alert)”. A notification profile would be created based on the name (person, organization, or full name) and the counties selected for the search that had just been performed.

2. Create a page to display saved notification profiles. Use the existing “Saved Searches” page as the model for the notification profiles page. Instead of using the label “Saved Searches” use the label “Saved Notification Profiles”. Alternatively: “Notification Profiles”.

   Modify the display of the Saved Notifications as follows:

   - The title of each profile would be formatted as “Notification: [Insert Name Specified]”
   - Created On: [Date Profile Created]
   - Counties: [Specify Counties Selected or All”

   The trash can icon would be retained and, if selected, the notification profile would be removed

   The right arrow, used to initiate the search, would be removed and replaced with an “Edit” label. Selection of the Edit label would return the user to Interface A, where the user might alter the name or specify a different county or counties.

   Include a link on this page to view a new page for viewing prior notifications (Notification History). It could be a button, similar in style to the “Create Notification” button described previously.

3. Create a “Notification History” page, labeled as such. The page would present a table of information about previous notifications sent to the user. The column headings would be as follows”

   - Notification Profile: Displaying the Name on which the profile is based.
   - Date of Notification
   - Recording Date
   - County Name
   - Document Type
   - Recording Reference Number
   - Recording Book /Recording Page (if applicable)

Alert Feature available as a part of a Name Search.

- Unique Code Value [an active link to the referenced document in the search app.]
- A search link to the document details

4. Create a link labeled "See Alerts" would be displayed in the left navigation bar, and when selected, the Notification History page would be displayed.
5. Create a Purge utility. When a Date of Notification is more than one year old, the utility would purge the notification from the Notification History.
6. If a user's search account is removed or becomes inactive for any reason, the names would be retained in the Party Name Table for a period of four years and the notifications would continue. Thereafter, the names would be purged from the Party Name Table. An inactive user would also be able to set up a new user account and new notification profiles.

ILR Notification System Administration Interface Tasks

1. Create a user interface for ESS Admins to allow them to edit or download the Party Name Table.
2. Create a report for ESS Admins permitting them to view and download a notification/alert history by notification date range, recording date range, upload date range, county name, or username.

Future Notification System Enhancements

1. Create a notification search utility based on the document reference numbers or unique code values. The utility would enable a notification or alert for the recording of any document with an associated reference to a specified document
2. Create an Associated Reference Notification Table.
3. Persist positive search results to the Temporary Notification Table.
4. Follow similar procedures for name notifications

ELECTRONIC SERVICES SYSTEM
8711 Windsor Parkway, Suite 2
Johnston, Iowa 50131

January 13, 2026

To: ESS Coordinating Committee

From: Phil Dunshee

Re: Project Updates – Director Search, Maintenance Cost Sharing, Finance Procedures, Office Space

The agenda for the January 13 ESS meeting includes several project update items. Time at the meeting is limited, and we want to provide you with a brief written update on these topics.

MAINTENANCE COST SHARING
The adopted 2026 ESS budget estimates that the total cost for local maintenance services (participating service providers) will be $293,284.00. The budget also allocated $140,000.00 for the cost sharing credits. The next step will be to calculate the E-Submission ratio and credit amount for each county. You may recall that the Committee authorized staff to calculate the 2026 cost sharing credits based on the formula specified in Chapter 9 of the ESS Policies and Procedures plus a standard amount per county to fully use the amount budgeted, to the extent practicable.

The standard maintenance cost for each participating county and service provider is $3,319.10. The average is expected to be about $1,591.00. Credit amounts will vary based on each county's E-Submission ratio. Invoices from local service providers have been received, and ILR is making the required payments. Invoices from ESS to the counties will be distributed by the end of January.

FINANCE PROCEDURES
The ESS Finance Subcommittee held their regular monthly meeting on January 8, 2026. Included in the agenda was discussion of a draft amendment to ESS Finance procedures. The amendment also included a proposed policy change to have the ESS Coordinating Committee hold an organizational meeting each January to elect officers and to take care of any necessary business prior to the regular quarterly meeting in February. The Finance Subcommittee voted to table the measure and to seek additional input from ESS members. The draft policy and explanatory memo are included in this January ESS meeting packet.

DIRECTOR SEARCH
The Executive Director position was posted on LinkedIn and Indeed in December. Over 125 applications have been received to date. ESS staff Lisa Long and Samantha McMahon conducted an initial review and organized the information and resumes for the search committee (Julie Haggerty, Stacie Herridge, Ann Ditsworth, Natalie Steffener and Jamie Stargell). The committee received all resumes, and they will be meeting sometime during the week of January 19 to confer. In the meantime, the position postings on LinkedIn and INDEED remain open, and any additional applications will be forwarded to the committee for review.

OFFICE RELOCATION
The search for alternative office space is underway. The search is primarily focused in the areas of Clive, Waukee, West Des Moines, Urbandale and Johnston, as this is the vicinity where most of the ESS employees live. Office characteristics being reviewed, in addition to office space and cost, include conference room access, enclosed offices for management and customer service, technology configuration, restrooms, and other integrated services. More detailed information will be available at the February meeting. The objective is to be ready to move by April 1 when current arrangements are expected to end.

The team will be happy to answer any questions at the meeting as time permits.

ELECTRONIC SERVICES SYSTEM
8711 Windsor Parkway, Suite 2
Johnston, Iowa 50131

January 8, 2026

To: ESS Finance Subcommittee

From: Phil Dunshee

Re: Draft Finance Procedures

As noted in the summary of the December ESS Finance Subcommittee meeting, last year a working group was established by the Iowa County Recorders' Association to review both the 28E agreement and the ESS Policies and Procedures. A few topics were discussed about the finance packet contents and procedures relating to the ESS budget. The Subcommittee (and the ESS Coordinating Committee) were asked to review several possible changes to Policies and Procedures and to consider making other recommendations regarding finance procedures. Some comments were received from committee members, and some options were suggested by the ESS Project Manager.

Based on the input received and various informal discussions, a draft set of amendments has been prepared for review. These amendments are found on pages 138 through 141 of the January 2026 ESS Finance Subcommittee meeting packet. This is a summary of the content of those amendments.

1. Section 1.6, subsections 5 and 7 would be modified to require that the ESS Coordinating Committee hold an organization meeting each January to elect officers. Normally the first meeting each year would be in February. An organizational meeting in January would fulfill the task of electing officers earlier, which would also allow the new Chair to make the appointments to the subcommittees earlier.

2. Section 1.6, subsection 7 would be modified to make the ESS Secretary/Treasurer a standing member of the Finance Subcommittee. (current practice.)

3. A new paragraph would be added to Section 1.6, subsection 7 and require that the Chair make the appointments to any subcommittee created by the ESS Coordinating Committee. This is intended to ensure the timely appointment of subcommittee members. It also does two other things.

    a. It allows staff designated by a county recorder to serve as a member of a subcommittee, and
    b. It requires the subcommittee members to be associated with qualified county recorders. "Qualified County Recorders" are currently defined in the Policies and Procedures to be "A County Recorder from a County which is a member of the Electronic Services System 28E organization". A Qualified County Recorder is already required for members of the ESS Coordinating Committee. See section 1.6, subsection 3, unnumbered paragraphs 3 and 4.

4. Section 1.7, subsection 1 paragraph 1 is modified to do the following:
    a. explicitly states that nominations should be representative of the six ICRA districts (current practice)
    b. designates the ICRA Treasurer as a standing member of the Finance Subcommittee (in addition to the ESS Secretary/Treasurer) (current practice)
    c. establishes a limit of three consecutive terms for ESS Subcommittee members (terms remain at two years)

5. Section 1.7, subsection 1 paragraph 2 is added to do the following:
    a. require the annual designation of a chair and vice chair to conduct meetings and coordinate with staff (current practice is to designate a chair only)
    b. explicitly allows a chair or vice chair to make motions and vote (current practice)
    c. requires a quorum to act and defines a quorum to be a simple majority of the subcommittee members

6. Section 1.7, subsection 3 is modified to do the following:
    a. explicitly requires the Finance subcommittee to review quarterly and year-to-date financial reports to be presented to the ESS Coordinating Committee for approval (current practice)

7. Section 1.7, subsection 4 is modified to add a more complete description of processes to be followed in the preparation and approval of budgets and budget amendments - current practice is described

8. Section 1.7, subsection 6 is modified to clarify that expenditures from the Software Development and Equipment Maintenance Reserve be authorized by the ESS Coordinating Committee (current practice)

We look forward to the discussion.

pd

Chapter 1
ESS Subcommittees and Finance Procedures

Chapter 1 of the Electronic Services System (ESS) Policies and Procedures is amended to clarify procedures relating to the appointment of subcommittees and the procedures of the ESS Finance Subcommittee.

1. Section 1.6 (5) Time and Location of Meetings, is amended to read as follows

1.6 (5) Time and Location of Meetings. The ESS Coordinating Committee shall conduct an organizational meeting each calendar year, which shall be held not later than January 15, to elect officers and conduct other necessary business. The ESS Coordinating Committee shall hold regular ~~meet~~ quarterly meetings at a time specified by the chair. The Committee may meet in person or by electronic means. Additionally, the ESS Coordinating Committee shall meet as necessary in joint session with Iowa County Recorders' Association Executive Board at a time and location determined by mutual agreement. Other meetings may be called by the Chair or Vice Chair of the Committee.

Meetings shall be conducted in accordance with the requirements of Chapter 21 of the Iowa Code. Items shall be placed on the agenda according to the order of business. The order of business for each regular meeting shall be as follows:

Welcome and Introductions
Approval of Meeting Summary
Financial Reports
Action and Discussion Items
Informal Discussion and Public Comment

By general consent of the Committee, items may be considered out of order.

2. Section 1.6 (7), Officers, is amended to read as follows

1.6(7) Officers. There shall be three officers of the ESS Coordinating Committee, consisting of a chair, vice-chair and secretary/treasurer.

Not later than January 15 of each calendar year, the ~~The~~ ESS Coordinating Committee shall nominate and elect a chair, vice-chair and secretary/treasurer from the ESS membership. The term of Office for the Chair, Vice Chair & Secretary/Treasure shall be one year. However, an Officer may serve successive terms with no limit to the number of terms.

The Chair shall convene and preside over all meetings or shall arrange for other members of the Coordinating Committee to preside at each meeting in the following order: Vice Chair, Secretary/Treasurer. ~~The Chair shall also appoint members of any subcommittees established by the Coordinating Committee.~~

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The Secretary/Treasurer shall be responsible for keeping records of ESS Committee actions, including overseeing the preparation of meeting summaries and financial reports, and ensuring that corporate records are maintained. The Secretary/Treasurer shall also serve as a standing member of ESS Finance Subcommittee.

Immediately following the appointment of ESS Officers, the Chair shall appoint the members of any subcommittee established by the ESS Policies and Procedures or otherwise established by the ESS Coordinating Committee. The Chair shall appoint the recorder or members of any subcommittee from the Qualified County Recorder nominations submitted. A Qualified County Recorder may designate a staff representative who may be nominated and appointed to serve on a subcommittee.

3. Section 1.7, Financial Procedures, is amended to read as follows

ESS – 1.7 Financial Procedures.
(Iowa Code Section 331.604, Subsection 3(a))

1.7 (1) ESS Finance Subcommittee. An ESS Finance Subcommittee is established to review the financial activities of the Electronic Services System. The ESS Subcommittee shall be nominated by and be representative of each of the six districts of the Iowa County Recorders Association. The Secretary/Treasurer of the ESS Coordinating Committee and the Treasurer of the Iowa County Recorders Association shall serve as standing voting members of the ESS Finance Subcommittee. An appointed member of the ESS Finance Subcommittee shall be eligible to serve for no more than three consecutive terms.

The ESS Finance Subcommittee shall annually designate a Chair and Vice Chair to conduct meetings and to coordinate communication with ESS Administrative and Finance staff. A Chair or Vice Chair shall be eligible to make motions and to vote. A quorum of the ESS Finance Subcommittee members is required to take action. A quorum is defined as a simple majority of the appointed members including the ESS Coordinating Committee Secretary/Treasurer and the Treasurer of the Iowa County Recorders Association.

1.7(2) The ESS Finance Subcommittee shall perform the following duties.

a. Assist with the development of an annual budget for ESS and the county land record information system.
b. Review monthly invoices and claims for payment.
c. Review financial reports, meeting summaries and other information as necessary.
d. Assist the ESS Coordinating Committee with financial matters.

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1.7(2) Review and Approval of Expenditures. Accounts payable (invoice payments, credit card charges and claims for payment) shall be reviewed by the ESS Finance Subcommittee. The Subcommittee shall advise the ESS Coordinating Committee of issues and activities which require formal action.

1.7(3) Review and Approval of Financial Reports. Financial reports shall be reviewed by the ESS Finance Subcommittee monthly. The Subcommittee shall advise the ESS Coordinating Committee of issues and activities which require formal action. Quarterly and Year-To-Date Financial reports shall be reviewed and ~~approved by~~ presented to the ESS Coordinating Committee for approval.

1.7(4) Annual Budget. The ESS Finance Subcommittee shall assist the ESS Coordinating Committee with the development of an annual budget and any budget amendments. Budget procedures shall include the following elements.

- Ongoing discussion and review and financial trends and economic indicators
- Preparation of a draft line-item budget or budget amendment by ESS administrative staff for review in conjunction with preparations for each quarterly meeting of the ESS Coordinating Committee.
- Preparation of a detailed memorandum prepared by ESS administrative staff which describes proposed adjustments from budgeted to actual amendments, highlights notable changes in revenue or expenditures, and projects necessary adjustments to revenues and expenditures which may be required to address changes in economic or financial conditions and to ensure a balanced budget.
- Approval of a recommended budget action to the ESS Coordinating Committee.

An annual budget and any recommended amendments to the budget shall be presented to ~~reviewed and approved by~~ the ESS Coordinating Committee for approval.

1.7(5) Annual Audit. Financial accounts managed directly by ESS Coordinating Committee shall be audited annually by an independent auditor. Financial accounts managed through the Office of the State Treasurer shall be subject to the auditing procedures of the State Auditor.

1.7(6) Allocation and Expenditure of Reserve Funds. The following reserve funds are established.

a. Treasury Management Software Development and Equipment Maintenance Reserve. The purpose of the reserve is to provide resources for authorized software development, technical assistance, equipment replacement or maintenance, and human resource management activities.
b. Treasury Management Redaction Reserve. The purpose of the reserve is to provide resources for the redaction of personally identifiable information which may be included in images of Back File documents as defined in Section 4.1.
c. Treasury Management Restricted Operating Reserve. The purpose of the reserve is to provide resources which may be necessary to sustain the operation of the Electronic Services System due to an unforeseen event or emergency.

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d. Treasury Management Unrestricted Reserve. The purpose of the reserve is to provide resources for planned operating expenses when income varies from budget projections.

Any reserve funds shall be reviewed at least annually by the ESS Coordinating Committee and the ESS Finance Subcommittee. The expenditure of Restricted Operating Reserve funds and Software Development and Equipment Maintenance Reserve funds shall be subject to the approval of the ESS Coordinating Committee. The Administrator/Project Manager shall inform the ESS Coordinating Committee and ESS Finance Subcommittee of the expenditure of ~~any other reserve~~ Redaction Reserve or Unrestricted Reserve funds. As needed the reserve funds may be adjusted or rebalanced by the ESS Coordinating Committee.

Funds not allocated to a reserve fund in the Treasury Management account shall be available for general operating expenses and to maintain the necessary liquidity for daily operations including the distribution of funds to participating public agencies, budgeted operating expenses, and payments to vendors.

Section 1.7 (6) revised 5.9.19
Section 1.7 (6) revised 2.6.20
Section 1.7 (6) revised 11.5.20
Section 1.7 (2-4, 6) revised 8.10.21
Sections …() revised 01.--.26

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County Recorders Provide Essential Services to Iowans & the Real Estate Industry

The Iowa County Recorders Association (ICRA) has serious concerns regarding the recent Iowa Department of Government Efficiency (DOGE) final report, which recommends combining the offices of County Recorders and Treasurers. County Recorders provide essential services to Iowans and our offices should remain standalone.

County Recorders are Critical to the Real Estate Industry
Iowa operates as a race-to-file state, requiring documents to be filed promptly and accurately. Recorders ensure real estate transactions are processed efficiently, providing essential support to abstractors, realtors, bankers and other industry professionals. Combined or consolidated offices could lead to delays in real estate transactions across the state.

The Iowa Land Records (ILR) system, developed and maintained by Recorders, enables electronic filings statewide. In 2024 alone, over $9 million in recordings were submitted electronically. Dissolving the Recorders Association—which oversees ILR in collaboration with stakeholders—would jeopardize this system which benefits the entire real estate industry in our state. The statewide platform delivers cost savings that individual counties could not achieve independently.

County Recorders Help Protect Private Property Rights
County Recorders play a critical role in safeguarding private property ownership in Iowa. Every document filed in a Recorder's office helps establish a clear chain of title—protecting families, farmers, and businesses by ensuring their property rights are preserved for generations. Recording creates the legal certainty necessary to defend ownership during disputes, transfers, or condemnation proceedings. Weakening or consolidating the Recorder's office risks delays and errors that could compromise the integrity of property records. Maintaining an independent Recorder ensures that Iowa landowners retain a trusted local guardian of their most valuable asset: their private property.

Recorders and Treasurers Provide Entirely Separate Services to Iowans
The functions of County Recorders and County Treasurers are fundamentally distinct, each governed by separate state agencies. Recorders follow directives from the Iowa Department of Natural Resources and the Iowa Department of Health and Human Services, while Treasurers operate under the Iowa Department of Transportation. Consolidating these offices would impose significant upfront costs for new technology and system upgrades—expenses borne by counties without guaranteed savings. Moreover, employees would face steep learning curves across multiple platforms and regulatory frameworks, increasing the likelihood of errors, service delays, and compliance risks. These operational challenges would drive higher turnover and exacerbate burnout among elected officials, undermining continuity and accountability. In short, consolidation threatens service quality and fiscal stability without delivering the efficiencies promised.

County Recorders Maintain Vital Records
Beyond real estate, Recorders manage vital records necessary for obtaining passports, driver's licenses, and other key documents. Maintaining dual offices for county collections enhances accountability and reduces the risk of fraud.

Local Accountability Already Exists
As elected officials, Recorders remain accountable to local voters. Under existing Iowa Code §331.323, voters may petition the board of supervisors to hold an election to consolidate any of the 11 different county officers when appropriate.

For Questions, Please Contact ICRA Legislative Representatives:
Jordyn Hill, Warren County Recorder 515-690-9111 Julie Haggerty, Polk County Recorder 515-286-3160
Updated 12/12/2025

Combining Offices Does Not Offer Cost Savings
The DOGE report projects cost savings through Recorder and Treasurer consolidation, but those projections rely heavily on staff reductions. However, our offices are already operating at minimal staffing levels. Any further reductions would either eliminate essential services or significantly compromise accessibility and efficiency for Iowans. Consolidating offices does not necessarily mean reduced salaries.

In short, consolidating offices does not guarantee cost efficiency—it risks service quality and may ultimately increase expenses.

RECORDERS & TREASURERS PROVIDE UNIQUE, CRITICAL SERVICES TO IOWANS

Recorder Duties		Treasurer Duties	
Function Through	Current	Function Through	Current
IA Dept of Natural Resources	Titling & registration of off-road vehicles & boats.	IA Dept of Transportation	Issuing vehicle titles, registrations and license plates, collecting use tax for on-road vehicles.
Iowa Land Records	Electronic Recording of real estate records.	99 Counties	Preparation and collection of property tax statements, administration of Iowa property tax credit programs, oversight of annual tax sales & distributions to taxing entities.
IA Dept of Health & Human Services	Vital Records: Marriage license, Certified Birth/Death/Marriage Certificates.		Financial management includes receiving, managing, and disbursing all county monies. Investing county funds, keeping official county financial records.
US Dept of State	Passport services.	IA Dept of Transportation	Issuance of licenses where DOT does not have a field office
IA Dept of Natural Resources	Hunting & Fishing licenses.	IA Dept of Revenue	Serves as agent, collects and remits taxes.
Local Records Management Software	Recording of documents, receipting of funds collected, preparation of reports, weekly, monthly & quarterly.		
IA Dept of Revenue	Collecting and remittance of Transfer Tax, Local Option Sales Tax, Use Tax and State Sales Tax.		

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