

ESS

Electronic Services System – Coordinating Committee Meeting

Agenda

Web Conference

December 12, 2023

12:00 P.M. to 1:30 P.M.

- **Welcome and Introductions**
- **November 9, 2023 – ESS Coordinating Committee Meeting Summary – Approval**
- **Contracts and Agreements**
 - **Agreement for Enterprise Cloud Services – Approval**
 - **LightEdge**
 - **Agreement for Office IT Services – Approval**
 - **ESS/Enterprise Iowa MOU Update – Approval**
 - **ESS Alternative Office Space Search – Discussion**
 - **Point of Sale System Review - Discussion**
- **Adjourn - Next Regular Meeting February 15, 2024**

ESS Coordinating Committee Meeting Summary November 9, 2023

Participants

Nancy Booten, Lee County Recorder
Jamie Stargell, Adams County Recorder
Natalie Steffener, Des Moines County Recorder
Lindsay Laufersweiler, Webster County Recorder
Dillon Malone, Iowa Title Guaranty

Jolynn Goodchild, Plymouth County Recorder
Denise Baker, Wright County Recorder
Melissa Bahnsen, Cedar County Recorder
David Erickson, Dentons Davis Brown

Other Participants

Sheri Jones, Jones County Recorder
Sue Meyer, Clayton County Recorder
Ann Ditsworth, Dickinson County Recorder
Lisa Long, Iowa Land Records
Kristen Delany-Cole, Iowa Land Records
Kelly Wallace, Iowa Land Records

Stacie Herridge, Story County Recorder
Kim Painter, Johnson County Recorder
Jan Gemar, ILTA
Phil Dunshee, Iowa Land Records
Kay Kelleher, Iowa Land Records

Welcome

A meeting of the ESS Coordinating Committee was held via web conference and in-person. The meeting was called to order by Nancy Booten and introductions were made.

May and July Meeting Summaries

The meeting summary from August 8 was reviewed by the committee with two minor spelling corrections. Lindsay Laufersweiler made a motion to approve the meeting summary as presented. Jolynn Goodchild seconded, and the motion was approved.

Meeting Schedule

The 2024 committee and subcommittee meeting schedules were presented for review and approval. The Finance subcommittee meeting was held on November 7, 2023, and they agreed to schedule their meetings on Thursdays each month at 9:00 AM. The Standards subcommittee has agreed to their proposed schedule.

After discussion, it was suggested that the 2024 ESS Coordinating Committee meeting dates be scheduled for Thursdays on February 15, May 16, August 15, and November 14 in 2024. Melissa Bahnsen made a motion to approve the ESS coordinating committee meeting schedule as revised. Jolynn Goodchild seconded, and the motion was approved.

Committee Terms of Office

The terms of office for six members of the ESS Coordinating Committee are set to expire in December 2023. Members were encouraged to communicate with their respective districts and to request that nominations be submitted soon to Nancy Booten, ICRA President.

Member Topics

Time was set aside in the agenda to discuss topics and questions identified by members of the Committee.

Credit Card Machines

A recent disruption in the point-of-sale credit card system identified a potential issue with the credit card devices. The devices installed in many Iowa counties may be reaching a point in the equipment lifecycle where programming updates could be more limited and at some point, stop functioning. The Committee discussed options for replacing the devices and sought clarification about the financial responsibility for the devices. After the referenced service disruption, ESS staff learned that there was not an immediate need to replace all devices, but that plans should be made for it in the next year. (Current ESS policy provides that ESS may assist counties with the replacement of payment equipment, but there is no specific program established to administer it. Action to replace equipment are made on a case-by-case basis.

ESS staff is currently reviewing payment gateway costs for credit/debit card payments. This review will be expanded to include a review of credit card payment gateway options, and options for securing alternative, updated equipment.

Security Processes

A presentation was made at a recent PRIA conference about system security, and it specifically referenced an assessment available through the Cybersecurity and Infrastructure Security Agency (CISA) – see: <https://www.cisa.gov/>.

ESS and ILR Technical Lead Kelly Wallace joined the meeting and provided an overview of ESS/ILR security measures. He described how security and infrastructure are a large part of his daily work. Several years ago, the Iowa Department of Revenue required that ILR undergo a Safeguard security audit through the Internal Revenue Service. This process was the start of a multi-year effort on the part of ESS and ILR to replace outdated systems and software. We started with the recorder's E-Submission interface and continued with updates to the submitter interface, the ESS payment system, and most recently the search and administrative applications. The creation of a new API for E-Submission and County Upload processes, and the implementation of two-factor authentication has also been part of the journey. And that journey is ongoing with a planned update to the External Submitter API next on the "to do" list.

Kelly described how ESS and ILR follow CISA guidelines, and described regular scans for PCI compliance, and scans initiated by insurance companies as a part of their underwriting processes. ESS uses a product called Nessus/Tenable to monitor systems and to identify vulnerabilities. Logs of activity are maintained and referenced when needed.

ESS Project Manager Phil Dunshee noted that security is an ongoing process, and while ESS and ILR are on the right path, every system is at risk, and we cannot be smug or complacent.

Large Document Updates

Members discussed the desire of affected counties to take steps to include certain large electronic documents in the Iowa Land Records database so that users can access them online. Large documents are those which have many pages (sometimes hundreds) and usually have a large file size. In the early history of Iowa Land Records some documents simply couldn't be loaded into the database due to their size, and a decision was made to truncate those documents and to direct users to the appropriate county office. In more recent years, even as technology has advanced, there have been cases where a

large document did not successfully load into the ILR database, for various reasons, through the standard “county upload” process. ESS has established an FTP process to enable the transfer of large documents to ESS, and in the future, when the next generation county upload API is developed and deployed, it is expected that ESS systems will be better able to handle large documents.

Committee members expressed a desire for the ESS team to take steps to process any pending large document requests. The Project Manager advised that the ESS team will make their best efforts to address large documents as time permits. However, members were asked to understand that other system support and development issues affecting ESS applications and security will usually have a higher priority than posting a single document to the ILR website.

Appreciation was expressed for member efforts to ensure the completeness and accuracy of county information posted on the ILR website. It was noted that there are many other aspects of the database relating to completeness and accuracy that should be addressed in the future including document type mapping and indexing practices. The updated search application and utilities that have been created for recorders enable the review of daily document uploads, mapping, and indexing.

Formatting Standards and Roles

Members discussed recent activities to review document formatting standards, and practices which technically are contrary to the requirements of Section 331.606B of the Iowa Code. Some recorders express support for following the letter of the law. Others feel that documents with minor imperfections which do not interfere with the recording process should be recorded given the importance of timely recording. Current ESS policy, (Section 5.4(1), lettered paragraph s.) generally supports the recording of documents with minor variances or imperfections.

In recent months the ESS Standards Subcommittee (along with a document formatting working group comprised of recorders) and the ESS Coordinating Committee have been asked to discuss and consider changes in policy and statute to allow for some of the variances so that the law and recording practices are better aligned. Potentially, a change in policy could result in more consistent recording practices among Iowa counties. Discussions on these topics are expected to continue in 2024 in the context of a “modernization” initiative of ESS and the Association. See: ESS/ICRA MOU Agreement under Contracts and Agreements.

Meanwhile, ESS will continue efforts to facilitate communication between submitters and recorders through the E-Submission service, and to provide guidance on best practices.

Financial Reports

YTD 2023 Financial Reports

The year-to-date budgeted income was \$1,402,731.88, and budgeted expenses were \$1,427,971.19. Net budgeted income was -\$25239.31. Total YTD income was \$25,450,490.84 and total expenses were 25,751,366.56. Net Total Income was -\$300875.72. This was associated with the planned use of \$271,570.00 in reserve funds for software development including updates to the Iowa Land Records search and administrative applications. Reserve funds were also used for back file redaction and a software license.

Total assets in the bank account stood at \$1,672,501.80 (accrual basis) while overall total assets amounted to \$2,412,424.55.

A motion was requested to accept and approve the 2023 YTD financial report. Natalie Steffener moved to approve the 2023 YTD report. Jamie Stargell seconded, and the motion was approved.

2024 Bankers Trust Banking

The ESS Coordinating committee was informed that ESS will need to apply for a new signature card in 2024 anticipating that there could be a change in ESS officers. This action would likely occur at the February 2024 meeting.

ESS Financial & Strategic Review

October Metrics

The latest E-submission trends report reflects current economic trends. E-submission activity in October 2023 was similar to the activity in 2019 and 2022 and behind the levels of 2020 and 2021. The lower number of E-submissions as we approach the end of 2023 will impact end of year finances. While there was an uptick in e-submissions in December 2020 and 2021, that did not happen in 2022. It is uncertain if there will be a rebound this December.

Economic trends also include inflationary pressure on costs such as software licenses and general business expenses.

Operating Cost Review

The Committee received information about pending reviews of various expenses and options for reducing expenses. This included the review of office space options, office technology support, payment gateway service fees, and redaction services.

In addition to reviews of all line-item expenses in the budget, four main steps were proposed.

1. Temporarily reduce maintenance credits by \$55,000.
2. Temporarily use \$57,000 from reserve funds for software/tech expenses.
3. Implement a temporary wage freeze.
4. Shift the communications position to part-time.

ILR Budget Review and Action

CY 2023 Final Budget Amendment

A budget amendment for calendar year 2023 was presented for consideration. It reflected efforts to review all line items for potential cost savings. Generally, the amendment adjusted previously estimated income and expenses to actual costs for the first nine months of 2023. While most of the revenue and expenses for October were known, the accounts for that period were not yet fully reconciled. Best estimates of actual revenue and expenses were included in the budget amendment. Monthly income from E-Submission was held at \$75,000.00 and monthly income derived from the point-of-sale system was also held at \$8,000.00. Income through the end of the year was projected to be \$1,753,000.00. This is below the \$1,850,000.00 originally budgeted. Cost-saving efforts would be ongoing, but it was noted that there would likely be a small budget deficit when the year ends.

CY 2024 Budget

A budget recommendation for calendar year 2024 was based on 2023 trends. Expenditure adjustments

were made to various line items including reducing expenses on education and outreach activities. It also reflected the recommended changes to temporarily reduce maintenance credits by \$55,000, temporarily use \$57,000 from reserve funds for software/tech expenses, implement a temporary wage freeze, and change the communications position to part-time.

Income for 2024 was projected to be \$1,764,095.08. Expenses were projected to be \$1,763,717.01.

A request for approval of the CY 2023 Final Budget Amendment and CY 2024 Budget was made. Jamie Stargell made a motion to approve the CY 2023 budget amendment and the CY 2024 budget. The motion was seconded by Denise Baker, and it was approved.

Contracts and Agreements

ESS/ICRA MOU Agreement

An amendment to the memorandum of understanding between ESS and ICRA was presented. The amendment extends the agreement to December 31, 2024, and updates the scope of work to undertake an initiative to modernize recording and land record services. The amendment also provides for a budget of \$43,000 for services to be provided by ESS to ICRA.

A request was made to approve the proposed MOU Amendment dated November 9, 2023. Jamie Stargell made a motion to approve the ESS/ICRA MOU Amendment. Lindsay Laufersweiler seconded the motion, and it was approved.

Rafferty Group CY 2024 Engagement

The Rafferty Group provides government relations services to ESS. A proposal to extend the engagement with the Rafferty Group through calendar year 2024 was presented for approval. Denise Baker made a motion to approve the Rafferty Group CY 2024 engagement at \$24,000.00. Natalie Steffener seconded the motion, and it was approved.

Brick Gentry CY 2024 Engagement

Brick Gentry provides ESS with legal services. The Brick Gentry calendar year 2024 agreement for \$2,250.00 per month on a retainer basis was presented for approval. Jolynn Goodchild made a motion to approve the engagement. Lindsay Laufersweiler seconded the motion, and it was approved.

Local Service Provider FY 2025 COLA

The ESS Coordinating committee was informed about the Social Security 3.2 percent benefit increase in 2024. The committee was informed about the impact of the change on local service provider maintenance costs for FY 2025.

ESS/Enterprise Iowa MOU Update

An amendment to a memorandum of understanding between ESS and Enterprise Iowa was presented for consideration. The ESS/EI MOU was amended in November 2021 to require the modification of certain business arrangements to facilitate the independence of ESS including arrangements relating to a multifunction printer, telephone services, office technology support, and licenses for Microsoft Office 365 software. The actions have been completed in 2023. The next step to establish independence is to explore alternative office space. To facilitate such a transition, the proposed amendment to the MOU would require a 90-notice prior to any change in office arrangements.

ESS staff had been assigned the task of researching alternative office space. The ESS Coordinating Committee requested that ESS staff continue their research and report back by the February 2024 ESS meeting.

Melissa Bahnsen made a motion to approve the ESS/Enterprise Iowa MOU to provide for the 90-day notice. Jamie Stargell seconded the motion, and it was approved.

ILR Staff Compensation

Communications Coordinator. A recommendation was made to approve an offer of employment to Kristen Delaney-Cole for a restructured Communications Coordinator position. The new structure provides that the position is part-time, at an hourly rate of \$31.25.

Melissa Bahnsen made a motion to authorize the hiring of Kristen Delany-Cole to the part-time position as recommended. Lindsay Laufersweiler seconded the motion, and it was approved.

Developer Compensation Adjustment. A recommendation was made to make a compensation adjustment for Merna Addison for the purpose of setting compensation at a level commensurate with her role and capabilities as a member of the development team. Given the general wage freeze being applied to the ESS employees due to budget constraints, the Committee deferred action on this recommendation.

Policies and Procedures

Terms of Use Update – Chapter 7

The Committee received a recommendation from the Standards Subcommittee to make several technical changes to the ESS Terms of Service. Several substantive updates had recently been approved, and when updating the Policies and Procedures document, several non-substantive words and phrases were identified as needing an update or correction. Proposed changes were as follows:

- Section 7.5 (Paragraph 1 and 6) Instead of using the term "he/she," the suggestion was to replace it with the term "they." As a result, the phrases would now read: "Each registered organization and user represents and warrants that they agree that the user identification and authentication procedures ..."
- Section 7.6 (unnumbered paragraph 2) A phrase is amended by inserting the term "physical" prior to the term document. It acknowledges the difference between physical and electronic documents.
- Section 7.7 (Subsection 3) Language is added to clarify that ESS may require an applicant to provide government documents to verify their identity (such as a Passport or Real ID).
- Section 7.8 A corrective edit to consistently use the term ESS throughout the Terms of Service.
- Section 7.9 (subsections 1 and 2) Language is modified and added to clarify that Individual Users not affiliated with an organization may request a temporary adjustment to document image view limits.

The ESS Coordinating Committee was asked to approve the proposed amendments to Chapter 7. Lindsay Laufersweiler made a motion to approve the amendment to Chapter 7. Jolynn Goodchild seconded, and the motion was approved.

Associated Reference Update – Chapter 3

A revised version of the policy was advanced by the ESS Standards Subcommittee for consideration. The revisions are intended to clarify that associated references shall be indexed "if present." Due to time constraints the action was deferred to the next ESS Coordinating meeting in February 2024.

Chapter 3 – Parcel Identification Numbers

A revised version of the policy to require the indexing of parcel identification numbers was advanced by the ESS Standards Subcommittee for consideration. The revisions are intended to clarify how soon the information is to be indexed after the document is recorded. Due to time constraints the action was deferred to the next ESS Coordinating meeting in February 2024.

BTB Redaction Policy

The ESS Coordinating Committee was advised that the “Back the Blue” redaction policy was under review, and that stakeholders were being engaged to discuss ideas and options. The Iowa Land Records team is aware that some proponents of the redaction policy have learned that the statute may not be producing the desired results. In anticipation of future conversations, the ILR team believed it appropriate to begin discussion options with interested parties including law enforcement, title companies, bankers and mortgage companies, and real estate attorneys.

Document Formatting Standards

The ESS Coordinating Committee received materials describing potential policy changes relating to document formatting and other forward-looking topics that were being reviewed by the Standards Subcommittee, a document formatting working group, and several stakeholder organizations. Due to time constraints the discussion was deferred to the next ESS Coordinating meeting in February 2024. No formal action is planned for the 2024 legislative session.

Pending Project Updates

The ESS Coordinating Committee received updates concerning various application changes and support activities in the development team’s work plan.

The meeting was adjourned. The next regular meeting will be **February 15, 2024**.

ILLUMINATE OPPORTUNITY.



IOWA LAND RECORDS

November 27, 2023

LightEdge Enterprise Cloud Environment

LIGHTEDGE ENTERPRISE CLOUD PROPOSAL



Iowa Land Records has expressed interest in shifting from a DIY model of procuring, licensing, and managing their own production infrastructure to the LightEdge Enterprise Cloud, which provides an as-a-service cloud model with predictable monthly recurring cost. Eliminating the responsibility of infrastructure management will allow for Iowa Land Records IT staff to focus on further development of the land records management platform so ILR can continue to be the best land records platform in the country. This shift in infrastructure strategy will provide the following benefits to the ILR team:

- Modernization of infrastructure platform
- Extension of staff as LightEdge becomes fully responsible for hardware
- Improved uptime
 - 100% Uptime SLA
- Improved security posture
- ILR staff can focus on development rather than infrastructure management and support
- Predictable cost model
 - Monthly cost remains the same each month versus unpredictable hardware expense during refresh period
- On-demand scalability of resources
- Fully Managed Backup solution with Immutable Copy of data in a second LightEdge Tier 3 data center

WHAT WE'VE HEARD

Current State	Business Impact	Solution Vision	Positive Business Outcomes
Colocation in LE Altoona data center for production environment	All hardware procurement, management, support, and break-fix managed by ILR staff (Kelly)	Migrate to LE Enterprise Cloud	ILR staff (Kelly) can focus time on initiatives that directly impact the business
SAN support contract ends in March 2024 Server hardware support contract ends 2 nd half of 2024	ILR would need to extend support if not migrated to LE Enterprise Cloud prior to March 2024	Migrate to LE Enterprise Cloud	Responsibility for procurement, licensing, support, and maintenance of hardware would shift from ILR to LightEdge, allowing ILR staff to focus on business-impacting tasks
Veeam backups in place for ILR VMs running in Altoona colocation	ILR staff responsible for continuing to manage backup software/hardware, configuration, monitoring, and problem remediation	Transition to LightEdge Managed Backup Service	Responsibility for procurement, licensing, support, maintenance, and monitoring of backup-related hardware/software would shift from ILR to LightEdge, allowing ILR staff to focus on business-impacting tasks

SOLUTION SUMMARY

LightEdge has proposed that Iowa Land Records migrate to LightEdge Enterprise Cloud, shifting existing spend for colocation services to the LightEdge Enterprise Cloud service. Migrating to LightEdge Enterprise Cloud will enable Iowa Land Records IT staff to focus on continued development of the ILR platform rather than focusing on infrastructure-related management, maintenance, and support. The LightEdge solution consists of the following components:

- Compute and Memory to host 40 virtual machines
- Performance, flash-based storage
- Consumption-based VMware licensing
- Managed Backups for 40 virtual machines
- Storage for backup data
- Immutable copy of backup data
- Redundant Dedicated Firewall
- DUO Multi-Factor Authentication
- Blended Internet Bandwidth

PROPOSED INVESTMENT

Status	Service Description	Quantity	Usage Rate	NRC	MRC	Term (Months)
New	Compute & Memory (per GB RAM) Monthly – GB <i>Delivered as resource pool, each 1GB RAM includes 0.25 vCPU</i>	330	\$4.000	\$0.00	\$1,320.00	36
New	Storage - Performance (Flash-based, Virtual SAN) Monthly – GB <i>Flash-based virtual SAN, best effort performance, per GiB provisioned</i>	18750	\$0.080	\$0.00	\$1,500.00	36
New	VMware Standard (per GB) Monthly – GB <i>Hypervisor licensing & management</i>	330	\$3.500	\$0.00	\$1,155.00	36
New	Backup Client (per protected server) Monthly	40	\$15.000	\$0.00	\$600.00	36
New	Backup Storage - Standard (per GB) Monthly – GB <i>Base backup storage and extended archival copies of existing base backups, custom daily/weekly/monthly/yearly retention</i>	18750	\$0.025	\$0.00	\$468.75	36
New	Backup Storage - Compliant (per GB) Monthly – GB <i>Extended archival copies of existing backups stored on Standard, ransomware protected, custom daily/weekly/monthly/yearly retention</i>	18750	\$0.050	\$0.00	\$937.50	36
New	Implementation Services (Migration) One-Time Fee	1	\$0.000	\$0.00	\$0.00	36
Continued	Redundant Data Center Physical Firewall (Extra Small) Monthly <i>Pair of FortiGate-60F appliances deployed in high availability mode, for compliant data center use cases, supports 0 - 250 megabits of traffic, includes UTM Protection, FortiCloud Analysis, 1 year log retention</i>	1	\$530.000	\$0.00	\$530.00	36
Continued	Standard Account Monthly - DUO MFA <i>LightEdge managed authentication with DUO MFA functionality, per user</i>	6	\$20.000	\$0.00	\$120.00	36
Continued	Burstable Internet Monthly - Mbps <i>Burstable Internet Monthly - Mbps</i>	200	\$6.750	\$0.00	\$1,350.00	36
New Total Monthly Recurring Cost					\$7,981.25	
Discontinued Services - Monthly Recurring Cost to be reinvested in LightEdge Cloud Services						
	Powered Circuit - Redundant A+B (120V/20A) Monthly	2	\$409.450	\$0.00	\$818.90	
	Port Services - LAN, Copper GigE - Edge Monthly	1	\$35.000	\$0.00	\$35.00	
	Rack Space - Full Rack (DC1 - 48U 24 inch width) Monthly	1	\$850.000	\$0.00	\$850.00	

Proposed Contract Language

- **True Down.** Customer shall have the right, during the first ninety (90) days following the date upon which the Services described above have been made available to Customer, to reduce its Quantity of Services described above by no more than twenty-five percent (25%) of the total MRC of this Service Order, without penalty, by sending an email to terminations@lightedge.com.
- **Early Termination Without Cause.** Customer shall have the right, during the first ninety (90) days following the date upon which the New Services described above have been made available to Customer, to cancel such New Services (up to the quantities described above) without penalty by sending a notice to terminations@lightedge.com ("Cancellation Right"). Customer's Cancellation Right does not apply to NRC(s)/ One-Time Fees, if any.

LightEdge MSA and SLA Documents: [Legal | LightEdge Solutions](#)

DOCUMENT INFORMATION

Customer Name	Electronic Services System dba Iowa Land Records
Customer ID	42264
SO Number	20534 v4
Quote Expiration	01-05-2024

LIGHTEGE CONTACT

Presented By	Jeff Short
Email Address	jshort@lightedge.com
Address	LightEdge Solutions 909 Locust, Suite 301 Des Moines, IA 50309

CUSTOMER INFORMATION

Contact Name	Phil Dunshee
Contact Title	Project Manager
Contact Phone	(515) 491-8939
Contact Email	phil@clris.com
Address	8711 Windsor Parkway, Suite 2 Johnston, IA 50131

CUSTOMER INFORMATION

Contact Name	Kelly Wallace
Contact Title	Technical Lead
Contact Phone	(515) 491-8939
Contact Email	kwallace@clris.com
Address	8711 Windsor Parkway, Suite 2 Johnston, IA 50131

New Services

QTY	DESCRIPTION	USAGE RATE	MRC(UNIT)	MRC
1435 Northridge Cr NE Altoona, IA 50009				
Internet - (36 Month Term)				Q035542
+250	Burstable Internet Cap - Mb	-	\$0.00	\$0.00
+200	Burstable Internet Monthly - Mb	-	\$6.75	\$1,350.00
	Burstable Internet Usage/Overage	\$13.50	-	-
	Subtotal:			\$1,350.00
1435 Northridge Cr NE Altoona, IA 50009				
Managed Firewalls - (36 Month Term)				Q035541
+6	Standard Account Monthly	-	\$20.00	\$120.00
	LightEdge managed authentication with DUO MFA functionality, per user			
	Standard Account Usage/Overage	\$40.00	-	-
+1	Redundant Data Center Physical Firewall (Extra Small) Monthly	-	\$530.00	\$530.00
	Pair of FortiGate-60F appliances deployed in high availability mode, for compliant data center use cases, supports 0 - 250 megabits of traffic, includes UTM Protection, FortiCloud Analysis, 1 year log retention			
	Subtotal:			\$650.00
1435 Northridge Cr NE Altoona, IA 50009				
Managed Services - (36 Month Term)				Q035514
0	Implementation Services (Migration) Recurring Fee	-	\$0.00	\$0.00
	Subtotal:			\$0.00
1435 Northridge Cr NE Altoona, IA 50009				
Private Cloud Data Protection - (36 Month Term)				Q035445
+40	Backup Client (per protected server) Monthly	-	\$15.00	\$600.00
	Backup Client (per protected server) Overage	\$22.50	-	-
+18750	Backup Storage - Standard (per GB) Monthly - Gb	-	\$0.025	\$468.75
	Base backup storage and extended archival copies of existing base backups, custom daily/weekly/monthly/yearly retention			
	Backup Storage - Standard (per GB) Overage	\$0.0375	-	-
	Subtotal:			\$1,068.75
1435 Northridge Cr NE Altoona, IA 50009				
Virtual Private Cloud (vpc) - (36 Month Term)				Q035444
+330	VMware Standard (per GB) Monthly - Gb	-	\$3.50	\$1,155.00
	Hypervisor licensing & management			
	VMware Standard (per GB) Overage	\$5.25	-	-



SERVICE ORDER

+18750	Storage - Performance (Flash-based, Virtual SAN) Monthly - Gb	-	\$0.08	\$1,500.00
	Flash-based virtual SAN, best effort performance, per GiB provisioned			
	Storage - Performance (Flash-based, Virtual SAN) Overage	\$0.12	-	-
+330	Compute & Memory (per GB RAM) Monthly - Gb	-	\$4.00	\$1,320.00
	Delivered as resource pool, each 1GB RAM includes 0.25 vCPU			
	Compute & Memory (per GB RAM) Overage	\$6.00	-	-
	Subtotal:			\$3,975.00
7000-B Burleson Road Suite 400 Austin, TX 78744				
Private Cloud Data Protection - (36 Month Term)				Q035446
+18750	Backup Storage - Compliant (per GB) Monthly - Gb	-	\$0.05	\$937.50
	Extended archival copies of existing backups stored on Standard, ransomware protected, custom daily/weekly/monthly/yearly retention			
	Backup Storage - Compliant (per GB) Overage	\$0.075	-	-
	Subtotal:			\$937.50
NEW SERVICES TOTAL				\$7,981.25

One-time Fees

QTY	DESCRIPTION	NRC(UNIT)	NRC
+30	Implementation Services (Migration) One-Time Fee	\$0.00	\$0.00
ONE-TIME TOTAL			\$0.00

TOTALS	NRC	MRC
New Services		\$7,981.25
Total Service Charges	\$0.00	\$7,981.25



DOCUMENT INFORMATION

Customer Name	Electronic Services System dba Iowa Land Records
Customer ID	42264
SO Number	20534 v4

LIGHTEGE CONTACT

Presented By	Jeff Short
Email Address	jshort@lightedge.com

This Quotation is valid for 30 days from the date listed above and is subject to a mutually accepted service agreement. Pricing is not considered in effect or valid until countersigned by LightEdge Solutions management. This Quotation has been customized for your business. It should be held as confidential and not shared with other businesses or competitors.

The present Service Order is subject to, governed by, and forms a part of, (i) the Master Services Agreement entered into between Customer and LightEdge or, if no such agreement has been executed, (ii) the General Terms and Conditions available at: <http://www.lightedge.com/legal> (either of the above, the "Agreement"). Capitalized terms used therein but not defined shall have the meanings set out in the Agreement.

Amendment to the Agreement. The terms "Purchase Agreement", if any, as well as each reference to "Purchase Agreement(s)", if any, in the Agreement are hereby deleted and replaced with "Service Order(s)". Such clerical change is solely limited to the term Purchase Agreement and will not amend all other terms and provisions of the Agreement, which will remain in full force and effect.

ADDITIONAL TERMS and CONDITIONS

True Down. Customer shall have the right, during the first ninety (90) days following the date upon which the Services described above have been made available to Customer, to reduce its Quantity of Services described above by no more than twenty-five percent (25%) of the total MRC of this Service Order, without penalty, by sending an email to terminations@lightedge.com.

Early Termination Without Cause. Customer shall have the right, during the first ninety (90) days following the date upon which the New Services described above have been made available to Customer, to cancel such New Services (up to the quantities described above) without penalty by sending a notice to terminations@lightedge.com ("Cancellation Right"). Customer's Cancellation Right does not apply to NRC(s)/ One-Time Fees, if any.

Upon completion of implementation of the present Service Order, the following services will no longer be available to Customer:

- +2 "Power Circuit – Redundant A +B (120b/20A) Monthly" for an MRC of \$818.90,
- +1 "Port Services – LAN, Cooper GigE- Edge Monthly" for an MRC of \$35.00, and
- +1 "Rack Space – Full Rack (DC1-48U 24 inch width) Monthly" for an MRC of \$850.

Electronic Services System dba Iowa Land Records

LightEdge Solutions, LLC

Signature

Signature

Name

Name

Title

Title

Date

Date

**Proposal For:**

Phil Dunshee
Electronic Services System
8711 Windsor Pkwy
Johnston, IA 50131

Prepared By:

Lauren Sharon
Iowa Solutions, Inc.
1620 NW 114th St
Clive, IA 50325

Service & Support - 2023 v.2

Prepared Monday, December 11, 2023

One Time Items**Price Qty Extended****1 Switchover Labor**

\$165.00 9 \$1,485.00

- Obtain login information to Fortinet
- Obtain both O365 Tenant Global Admin accounts
- Obtain Domain account access for both domains
- Obtain DNS account access for both domains
- Uninstall existing management agents
- Install management agents on PC's, MAC's and cloud consoles
- Complete Site Profile Documentation
- Gather copy of previous invoice with Lumen to update our Site Profile with information

2 Local Travel Charge

\$35.00 2 \$70.00

Recurring Items**3 Managed Labor**

\$165.00 1 \$165.00

Proposal includes up to 01 hour per month of labor services. Labor can be utilized for any technology service needed or requested locally and remotely, or for assisting with hardware & software procurement during normal business hours. Any onsite visit will include a flat rate travel charge of \$35.

4 Managed Devices - Essentials Package (2023)

\$20.00 6 \$120.00

- Keep your network safe by ensuring that all devices are protected and up to date.
- PC/MAC Performance Monitoring
 - Disk Health Check

- Patching – Windows and Mac
- Patching - Common 3rd Party Applications
- Standard Antivirus
- Hardened Baseline Configuration
- Inventory Reporting
- Best Practices - Human Assessment(s)
- Monitor and Manage Drive Encryption
- NGAV (Next Generation Antivirus)
- Technology Review(s)
- (EDR) Endpoint Detection & Response
- SIEM Log Alerts (PC, Mac, Firewall, and O365)
- 24/7 MDR (Managed Detection & Response)
- Threat Intelligence Hunting

5 **Proofpoint Email Threat Protection Advanced** \$5.00 8 \$40.00

Includes inbound and outbound email filtering, data loss prevention filters, Attachment Defense Reputation Service, URL Defense, One-Click Message Pull, 30 days of Emergency Inbox and Instant Replay.

o Includes Business Package features and Full Attachment Sandboxing, Email Warning Tags, Email Encryption and Social Media Protection.

Optional - Professional = \$7.00

o Includes Advanced Package features and email archiving (10-Year).

*Any initial seeding or importing of existing archive mail is completed via a ticket with Ingram Micro, free of charge but w/ associated hourly labor charges.

6 **Microsoft 365 Backup** \$5.00 8 \$40.00

Ensure that no matter where you're storing your data, you always have it backed up.

- Provides backups for Email, Teams, SharePoint and OneDrive (excludes APPs/Add-ons)
- Includes FOREVER incremental backups taken six times per day (7YR Retention)
- Microsoft's responsibility is stated "ensure that the service is operation and data is accessible"
- So, the bottom line is, you are responsible for your organization's data

safety

*Excludes nominal charge from Microsoft for Teams Chat backups via Microsoft Teams Export API. Approximate cost is \$0.00075 per message exported (one-time). Basically \$0.75 per month for every 1000 messages. Teams POSTS are backed up with the above service but as of this writing Microsoft does not allow the backup of individual CHATS. The POSTS are basically chats that occur on Teams channels.

7 **Firewall & Infrastructure Monitoring**

\$50.00 1 \$50.00

Firewall RMM

Infrastructure RMM

External Penetration Testing

XRAY Monitor

One Time Items: \$1,555.00

Recurring Items: \$415.00

Sales Tax: \$0.00

Total: \$1,970.00

Acceptance: Proposal valid for 30 days. To proceed, please call Lauren at (319) 734-5114, send an email to lauren@iowasolutions.com, or sign below and return. After Wednesday, January 10, 2024, please contact us for updated pricing.

Notes: The initial agreement is for a period of 1 year. Thereafter, the agreement will automatically renew on a monthly basis. Invoices are generated monthly and all recurring services are invoiced in advance. All payments are due within 30 days.

Acceptance Signature _____

Date _____

AMENDMENT 5 - MEMORANDUM OF UNDERSTANDING

The Memorandum of Understanding ("MOU") adopted on February 1, 2017, as amended on July 1, 2019, November 9, 2021, and November 10, 2022, and November 9, 2023 by Enterprise Iowa Inc. ("EI") and the Electronic Services System ("ESS") is further amended as follows. EI and ESS are collectively referred to as the "Parties."

ADDENDUM – Information Technology Support Services

Amendment Number 4 to the MOU between ESS and Enterprise Iowa referenced several steps that had been completed to assure that ESS would be positioned to operate independently. It was noted that ESS had established a separate service agreement for information technology support services and that the agreement was "month-to-month." This meant that ESS could establish a new support agreement with another vendor at any time.

Additionally, it was noted that the ESS team had issued an RFI for information technology services to identify alternative services to support and maintain ESS computing devices and to support the operation of the ESS Office 365 and SharePoint system. The RFI process is now complete, and a recommendation for ongoing ESS information technology support services has been made. The services would support ESS personal computing devices and the Office 365 software.

In October 2023 the ESS team issued an RFI for office space to several commercial office brokers in the Des Moines area. Responses and information about alternative office space arrangements are currently being reviewed. As currently configured, the firewall and wireless access point in the offices provided by Enterprise Iowa are a part of the office fixtures and maintained by the company. To the extent that any selected IT service provider assists with the maintenance of the firewall and wireless access point, such maintenance should continue to be the responsibility of Enterprise Iowa. For this reason, it is proposed that with respect to the provisions in the MOU relating to Office Transition, the language be modified to clarify this matter. The following revision is proposed.

Office Transition

All steps necessary to facilitate the transition of ESS operations to alternative office facilities have been completed. ESS and Enterprise Iowa mutually agree to provide the other with notice which is not less than 90 days prior to any change in office location or arrangements. Reimbursement for expenses associated with office facilities shall be provided to Enterprise Iowa as provided in the Contract Terms and Conditions between ESS and Enterprise Iowa. Enterprise Iowa will be financially responsible for providing the firewall, switch and wireless access infrastructure and any support services required for that infrastructure.

The Parties hereto have caused this amendment to the MOU to be executed as of the date set forth below.

APPROVED BY: Electronic Services System

By: Nancy Booten
Date: December 12, 2023
Title: ESS Chair

APPROVED BY: Enterprise Iowa

By: Phil Dunshee
Date: December 12, 2023
Title: President

Windsor Current Offices	4 offices		3 offices		includes utilities, janitorial, taxes, common area maintenance Internet Phones	
	Monthly Rent	\$3,050.00	\$ 2,287.50			
	Add'l Op Exp	\$ 250.00	\$ 250.00			
		\$ 210.00	\$ 210.00			
	Monthly Total	\$3,510.00	\$ 2,747.50			
Highlighted in Yellow - not a space that works well for us - too large, too small						
Regus Foxboro 6165 NW 86th St Johnston, Iowa	Option #1		Option #2		If needed Internet If needed Phones	
	Monthly Rent	\$3,093.18	\$ 3,227.10			
	Add'l Op Exp	\$ 250.00	\$ 250.00			
		\$ 210.00	\$ 210.00			
	Monthly Total	\$3,553.18	\$ 3,687.10			Conference space available - most free some with additional costs
Merle Hay Centre NAI Realty 6200 Aurora, Urbandale	Suite #	205E	206E	302W	407E	609E 608W
	Sq Feet	1,915	2,329	1,591	1,300	1,487 985
	Monthly	\$ 2,481.52	\$ 3,018.00	\$ 2,061.67	\$ 1,792.92	\$ 2,050.82 \$ 1,358.48
	Estimated Op*	\$ 485.00	\$ 485.00	\$ 485.00	\$ 485.00	\$ 485.00 \$ 485.00
	Phone & Internet	\$ 460.00	\$ 460.00	\$ 460.00	\$ 460.00	\$ 460.00 \$ 460.00
	Total Mo Estimate	3,426.52	3,963.00	3,006.67	2,737.92	2,995.82 2,303.48
Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration Hire movers Conference room available at no additional cost						
5000 Westown Pkwy, Clive, Iowa Knapp	Suite #	250	300	2nd Floor		
	Sq Feet	6,492	8,897	2,558		
	Monthly	\$ 6,221.50	\$ 8,526.29	\$ 2,451.42		
	Estimated Op*	\$ 5,399.18	\$ 7,399.34	\$ 2,127.40		
	Phone & Internet	\$ 460.00	\$ 460.00	\$ 460.00		
	Total Mo Estimate	12,080.68	16,385.63	5,038.82		
Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration Hire movers Conference room available at no additional cost						
One Corporate Place Knapp 1501 42nd Street West Des Moines, Iowa	Suite #	210	465	471	474	
	Sq Feet	1,851	2,484	1,001	550	
	Monthly	\$ 925.50	\$ 1,242.00	\$ 500.50	\$ 275.00	
	Est Op Ex	\$ 1,619.63	\$ 2,173.50	\$ 875.88	\$ 481.25	
	Phone & Internet	\$ 460.00	\$ 460.00	\$ 460.00	\$ 460.00	
	Est Mo Total	\$ 3,005.13	\$ 3,875.50	\$ 1,836.38	\$ 1,216.25	
Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration Hire movers Conference room available at no additional cost						
Deerwood Office Knapp 1700 118th St Clive, Iowa	Suite #	105	110	*110	250	*110 potentially divisable to 2100 sq ft
	Sq Feet	2000	*5071	2,100.00	2,241.00	
	Monthly Rent	\$ 1,500.00	\$ 3,803.25	\$ 1,575.00	\$ 1,680.75	Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration
	Monthy OP Exp	\$ 1,535.00	\$ 3,891.99	\$ 1,611.75	\$ 1,719.97	Hire movers
	Phone & Internet	\$ 460.00	\$ 460.00	\$ 460.00	\$ 460.00	Potential build out costs
	Estimated Monthly Total	\$ 3,495.00	\$ 8,155.24	\$ 3,646.75	\$ 3,860.72	Limited conference room availability

Ridgemont					
JLL	Suite #	12012			Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration
12012 Ridgemont Dr	Sq Feet	2000			Hire movers
Urbandale, Iowa	Monthly Rent	\$ 1,658.33			
	Monthly OP Exp	\$ 900.00			Conference room available at no additional cost
	Phone & Internet	\$ 460.00			
	Estimated Monthly Total	\$ 3,018.33			

West Park					
JLL	Suite #	1st Fl -A	1st Fl-B	2nd Fl	
5435 NW 100th St	Sq Feet	1696	1,704	3,500	Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration
Johnston, Iowa	Monthly Rent	\$ 1,978.67	\$ 1,988.00	\$ 4,334.17	Hire movers
	Monthly OP Exp	\$ 1,936.27	\$ 1,945.40	\$ 3,995.83	
	Phone & Internet	\$ 460.00	\$ 460.00	\$ 460.00	
	Estimated Monthly Total	\$ 4,374.93	\$ 4,393.40	\$ 8,790.00	

9550 Hickman	Suite #	105			
Clive, Iowa	Sq Feet	5,575			
Landmark Brokerage	Monthly	\$ 4,297.40			Purchase furniture, approximately \$5,000.00 - \$8,000 depending on configuration
	Estimated Op*	\$ 4,158.02			Hire movers
	Phone & Internet	\$ 460.00			
	Total Mo Estimate	\$ 8,915.42			

Iowa Recording Fee and Business Process Modernization Project

Project Charter Sponsor: ICRA Executive Board

Project Purpose: To develop recommendations and options for updating recording fees and to consider changes to the recording process that would be of benefit to recorders, customers, and stakeholders. Changes in recording fees would be for the purpose of sustaining recording services in county offices, to provide sustainable resources for the operation of the Iowa Land Records system, and to carry out possible special purpose projects in collaboration with key stakeholders.

Timeframe: Begin planning process following the Thanksgiving holiday and through August 2024. Advance recommendations for consideration to policy makers for consideration in the 2025 legislative session.

State Level Stakeholders: Iowa State Bar Association, Iowa Bankers Association, Community Bankers of Iowa, Iowa Mortgage Association, Iowa Credit Union League, Iowa Realtors Association, Society of Land Surveyors of Iowa, Iowa Land Title Association, Iowa Title Guaranty, IEDA and the State of Iowa, Iowa Journalists and Media, Taxpayer Advocacy Groups and the ESS Coordinating Committee itself.

Local Stakeholders: Recording Customers, Local Affiliates of the State Level Stakeholders, Other Customers, Locally Elected State Policy Makers, Other County Officials

Planning Processes: The planning processes would involve several different committees and workgroups as follows.

Fee Planning Work Group. This group will be comprised of the legislative co-chairs in each of the six ICRA districts plus the ICRA legislative co-chairs and the ICRA representative to the ISAC governing board.

Auditor Transfer Fee Subcommittee. This subcommittee, appointed by the ICRA President, would be tasked with communications with ISAC and the ISAC Auditor's affiliate concerning the Auditor's transfer fee, which may be affected by any modification to recording fees. To be initiated by ICRA President with the Auditor's affiliate President.

ESS Standards Subcommittee and Document Formatting Work Group. These groups, which have been meeting jointly through much of 2023, would continue their work to review document formatting policy and to consider other policies such as associated references, parcel identification number indexing and other reforms and best practices. Key stakeholders would be engaged in this process to provide input and recommendations.

Surveyors Working Group. This joint working group, appointed by the ICRA President and the leadership of the Society of Land Surveyors of Iowa, would be charged with reviewing indexing and formatting practices for surveys and plats and related documents, and to develop recommendations for a process and budget to digitize, index and electronically post older survey documents. Likely SLSI participants include members of their governing board.

Large County Advisory Committee. Recorders from the top ten highest population counties would be asked to act as an advisory body to the ICRA Executive Board concerning plans and recommendations that might have a specific effect on counties with higher populations.

As the planning processes unfold, there may be a need or benefit to creating other subcommittees or working groups to address specific topics.

Iowa Recording Fee and Business Process Modernization Project

Estimated Meeting Schedules

Fee Planning Work Group (Suggested/Tentative Schedule)

Thursday, December 14 (2023)

January 17 (Third Wednesday)

February 21

March 13 (Wednesday – possible special meeting (County Day at the Capitol))

March 20

April 24

May 15

June 19

July 17 (target recommendation date)

August 21 (if needed)

Auditor Transfer Fee Subcommittee

Meeting Schedule TBD

At Least One Scheduled Joint Meeting with the Fee Planning Work Group

ESS Standards Subcommittee and Document Formatting Work Group.

January 23 (Tuesday)*

March 13 (Wednesday – possible special meeting (County Day at the Capitol))

April 23 (Tuesday)*

June (possible special meeting – stakeholder discussions)

July 23 (Tuesday)*

*Regularly Scheduled Meeting

Surveyors Subcommittee

Meeting Schedule TBD (Planning meeting with SLSI leaders held on Nov. 21). Current task – identifying additional subcommittee members.

Other Stakeholder Meetings

Follow Up meetings with Iowa Bar and ILTA pending

Meetings with Iowa Realtors, Iowa Bankers and CBI pending

Communications with Iowa Credit Unions (they have suggested collaborating on a member survey)

August-December 2024 – Presentations to stakeholder groups/governing boards/lobbyists

Large County Advisory Committee

TBD

State Officials (TOS, AOS, SOS, DOR Governor)

December 12 - Meeting with TOS Staff to review payment process and update on activities.

ICRA Executive Board

TBD – meeting with Bill Peterson and staff

February 8 – possible presentation to supervisor's conference

June 25-28 – possible presentation to Auditors summer conference

August 15 - possible joint meeting with ESS Coordinating Committee*

* Regularly Scheduled ESS Meeting

Iowa Recording Fee and Business Process Modernization Project

Activities and Tasks Associated with Committees and Work Groups

Fee Planning Work Group

Review inflation data since 1985
Review service and technology changes since 1985
Discuss “Principles” that should guide recording fee decisions, e.g., to pay 100% of local maintenance fees
Survey recorders for preliminary impressions about recording fees
Survey E-Submission and traditional customers for impressions about recording fees
Update research on state recording fees (Ernst and Black Knight tools)
Calculate average pages per document
Review judicial filing fees and policies
Review and compare recording fee models
Survey recorders about alternative recording fee models
Survey E-Submission and traditional customers about alternative recording fee models
Review research results from 2020
Explore selected updates to 2020 research (costs of providing recording services)
Update flat fee model(s) for estimating recording fees
Run scenarios of flat fee models and estimate impact on counties (including population analysis)
Run scenarios of flat fee models and estimate impact on submitters
Prepare recommendations

Auditor Transfer Fee Subcommittee

Set Up meeting with Auditor Leadership (including ISAC staff)
Survey of Counties To document Income from Auditor Transfer Fees (2023)
Document uses of the Auditor Transfer Fees
Comparison with data from E-Submission (2023)
Develop alternative ideas for providing equivalent income to county auditors
Discuss collaborative opportunities between county auditors and recorders (tasks that can be performed by recorders?)
If there is opportunity, discuss ongoing conversations about eliminating recorders or combining offices

ESS Standards Subcommittee and Document Formatting Work Group.

Survey Submitters for E-Submission enhancements
Survey Searchers for Search enhancements
Survey Stakeholders and their members for suggested policy changes
Conduct user/stakeholder focus groups
Consider document formatting policies
Design projects for normalizing data
Design project to review document type mapping and to normalize document types
Design project to modify Back The Blue
Design project to facilitate associated references between title documents
Study options/benefits/costs to integrate with private registries and blockchain platforms
Design project to integrate ILR with other GIS systems (Beacon, et al)
Implement parcel identification numbers policy
Design project to establish a fraud alert notification system
Design project to begin indexing notary information (numbers/names)
Design project to modernize integration with External Submitters

Iowa Recording Fee and Business Process Modernization Project

Surveyors Working Group

Review existing processes to identify potential improvements (index legend, recording stamp area, multi-office workflow, color management)
Review proposed policy changes for associated references
Design project to add associated references to older surveys
Review procedures for digitizing older surveys
Develop cost estimate for project to digitize older surveys
Review procedures for indexing platted land
Develop indexing method to permit searches to follow a property's survey history

Large County Advisory Committee

Ongoing Communications and Dialogue with large counties concerning all activities
Review all modernization proposals to assess special impacts on large counties

Other Working Groups

To Be Formed based on topic/need

Iowa Recording Fee and Business Process Modernization Project

Activities and Tasks Associated with Advocacy

Monthly Advocacy Challenges (newsletters) and Other Channels

2023

October – Identify Key Local Stakeholders

November – Send Stakeholders a Greeting Card

December - Rate accomplishments, plan a community event, and log stakeholder communications (newsletter)

2024

January – monthly themes to be determined

Build Understanding of the Fee Issues – Multiple Communications Channels (Electronic Newsletter, Blog, Talking Points)

(Series of Articles)

Build Understanding of Modernization Options – Multiple Communications Channels (Electronic Newsletter, Blog, Talking Points)

(Series of Articles)

Advocacy Training – Webinars – Agenda

1. What's Happening Now?
2. What's The Next Step
3. Timely Advocacy Topics

Special Collateral Materials

March 13 (Wednesday – possible special meeting (County Day at the Capitol)) – Talking Points

TBD – meeting with Bill Peterson and staff – Talking Points

February 8 – possible presentation to supervisor's conference – Presentation Prep

June 25-28 – possible presentation to Auditors summer conference – Presentation Prep

August 15 - possible joint meeting with ESS Coordinating Committee – The "Plan"

June/July/August – Leadership/Stakeholder Meetings/Presentations - TBD