



STORY COUNTY **ASSET**
ANALYSIS OF SOCIAL SERVICES EVALUATION TEAM

ANNUAL AGENCY TRAINING

August 10, 2026

ASSET FUNDERS



ADMINISTRATIVE TEAM

OFFICERS:

- Linda Hagedorn, Chair
- Liz Zuercher, Vice Chair
- Ron Smith, Treasurer

SUPPORT STAFF (Nonvoting):

- Jess Peebler – Administrative Assistant
- Sarah Mansell – Data Support, Community Impact Director
- Amy Shaw – ISU Student Government

FUNDER STAFF (Voting) - 1 vote per Funder:

- Deb Schildroth, City of Ames
- Sandra King, Story County
- Ashley Thompson, United Way of Story County
- Klayten Perreault, ISU Student Government Nonprofit Coordinator



STORY COUNTY **ASSET**

ANALYSIS OF SOCIAL SERVICES EVALUATION TEAM

www.storycountyasset.org

This should be your first stop for questions and information

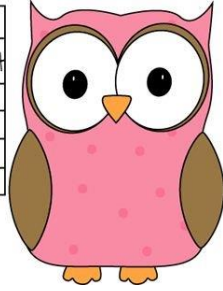
SERVICE DELIVERY AREA – STORY COUNTY

- **United Way & Story County** – program participants must be a resident of Story County
- **City of Ames** – program participants must be a City resident
- **ISU Student Government** – program participants must be an **ISU student** (Students' spouses and their dependents also qualify for services.)

Not sure about City or County Resident? - [City of Ames Boundaries](#)

IMPORTANT DATES FOR AGENCIES

Month						
Sun	Mon	Tue	Wed	Thu	Fri	Sat

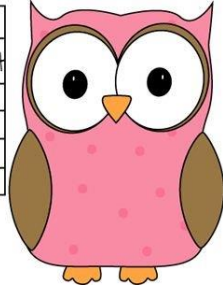


Check the calendar on the website for up-to-date information.

- **ASSET Meetings – Typically held the 2nd Thursday as shown on the ASSET Calendar at 5:00 pm**
- **Administrative Team Meetings - held monthly on the 1st Wednesday (unless otherwise indicated) at 12:15 pm**

IMPORTANT DATES FOR AGENCIES

Month						
Sun	Mon	Tue	Wed	Thu	Fri	Sat



- **ASSET Budget Workshop – Sept. 16 @ UWSC 1:00 – 3:00pm**
- **DEADLINE: Agency Budget Requests FY2027/28 – Sept. 23 by 11:59pm ***
- **DEADLINE: Summer Only 2026 Program Impact Data – Sept. 23 by 11:59pm**
- **DEADLINE: Revised Agency Budget Requests – Oct. 16 by 11:59pm ***
- **DEADLINE: Restated Agency Budgets – Nov. 13 by 11:59pm ***
- **DEADLINE: Mid-Year FY26/27 Scorecard Agency Updates – Dec. 14 by 5:00pm ***
- **Agency Hearings – Jan. 6 @ Ames Water Treatment Plant 4:30-8:30pm ***
- **Agency Hearings – Jan. 7 @ Ames Water Treatment Plant 4:30-8:45pm ***
- **Recommendations Posted – Jan. 22 by 11:59pm**

• *Mandatory for agencies

OPEN MEETINGS – IOWA CODE CHAPTER 21

- **Transparency, accountability**
- **Agenda posted 24 hours in advance**
 - **Ames City Hall**
 - **Story County Administration building in Nevada**
 - **Online**
 - **City of Ames – www.cityofames.org**
 - **Story County – www.storycountyiowa.gov**
 - **ASSET – www.storycountyasset.org**
- **Meeting materials and minutes – posted on the ASSET website**
- **Anyone can request public records - Iowa Code Ch 22**
- **List of confidential records are found in Iowa Code Section 22.7**



FUNDER PRIORITIES AND STORY COUNTY COMMUNITY HEALTH NEEDS ASSESSMENT (CHNA)

FUNDER PRIORITIES

www.storycountyasset.org

- Forms and Resources
- Funder Priorities


Priorities for FY 2026-27
Categories 1-5 are in priority order as are the related services in each category.
An emphasis is placed on low to moderate income individuals and families in all categories and services.

- 1. Basic Needs**
 - a. Short-term rent and utility assistance
 - b. Food insecurity and meal gap reduction
 - c. Reliable transportation access
 - d. Legal support
 - e. Medical and dental services
- 2. Homelessness Prevention and Housing Stability**
 - a. Transitional and supportive housing
 - b. Housing navigation services
- 3. Mental Health and Meaningful Connections**
 - a. Mental health and substance use treatment access
 - b. Social isolation reduction opportunities
 - c. Crisis intervention and crisis advocacy
- 4. Quality, Affordable Childcare**
 - a. Sliding fee scale options for children
- 5. Out of School Learning Opportunities**
 - a. Academic skill development and youth engagement
 - b. Participative learner reduction through financial and transportation support
 - c. Summer and after school academic programming

ISO GIS FY 2026-27 ASSET Funding Priorities

- 1. Basic Needs (Financial Stability)**
 - Expand emergency rent and utility assistance through local housing nonprofits
 - Improve access to hygiene supplies, clothing closets, food pantries, etc.
 - Provide short-term emergency transportation for disabled or uninsured residents.
 - Provide awareness of basic needs services through coordinated outreach and communication.
- 2. Mental Health (Health)**
 - Provide access to individual mental health services
 - Expand crisis prevention programs through community health departments and peer support initiatives.
 - Develop public education and awareness campaigns to reduce stigma and promote wellness.
- 3. Asset Care (Health)**
 - Expand mental health support services through crisis centers and Title IX offices.
 - Improve domestic abuse support by connecting residents with confidential advocacy and legal aid.
 - Develop public education and awareness campaigns to reduce stigma.
- 4. Substance Abuse (Health)**
 - Provide rehabilitation programs focusing on student-centered recovery support and community reintegration.
 - Launch treatment outreach program that discourages substance use and promote early intervention.
 - Offer harm reduction resources in coordination with public health agencies.
- 5. Children (Education)**
 - Promote access to affordable infant and toddler care.
 - Expand school-age care options for parenting students during classes and study hours.
- 6. Diversity And Inclusion (Education)**
 - Program Encouraging Inclusivity Discriminated Against Communities & People (e.g. disability status, gender, sexual orientation, race and ethnicity, etc.)
 - Promote social and family development programs focused on identity, belonging, and equity.
- 7. Legal Aid (Financial Stability)**
 - Offer support for civil cases, including housing, immigration, and employment law, through free legal clinics.
 - Assist students navigating protection services and identity.


STORY COUNTY BOARD OF SUPERVISORS
900 8th Street • Nevada, IA 50201
Phone: 515-362-7200 • Fax: 515-362-7206
Website: www.storycountyia.gov/boards

ASSET Funder Priorities
(Approved: 5/15/23 BOB Meeting for FY27 Budget)

- 1. Essential Basic Human Needs**
 - a. Food and nutrition
 - b. Emergency shelter services for individuals and families
 - c. Affordable, quality housing (including temporary/transitional housing, services and supports allowing people to remain in their homes – rent and utility assistance, senior and disability services, etc.)
 - d. Affordable, quality childcare
 - e. Access to health services (physical, behavioral, mental), dental, substance use disorder services
 - f. Transportation
- 2. Financial Stability and Empowerment**
 - a. Income (job training, skills upgrade)
 - b. Legal assistance
 - c. Access to emergency and crisis advocacy services
 - d. Protection and advocacy services
 - e. Programs and services that empower, support, and eliminate barriers for individuals and families
- 3. Education and Youth Development**
 - a. Social and educational development opportunities (summer enrichment, out of school programs, and similar educational services)
 - b. Education and awareness (public education and awareness, financial literacy, budget counseling, as well as training that enhances an agency's ability to provide quality services to an increasingly diverse County population)

NOTES for Agencies and Volunteers:

1. Complete and submit one priority order as listed.
2. Although Story County considers mental health and disability services to be priorities, it cannot help to pay for these services. Therefore, they are NOT funded through ASSET or the other.
3. Services funded by Story County must be provided and available to residents throughout Story County. We do not provide funding for services located in one area.
4. The Board of Supervisors is interested in understanding how agencies are providing services and identifying existing needs within their programs. Annual reports should include implementation and data collection methods, especially those aimed at demonstrating the effectiveness of those solutions.

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Lillian Foster
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ASSET Priorities for Fiscal Year (FY) 2026-2027
Priorities and sub-priorities are listed in rank order.

- 1. Basic Needs**
 - A. Short-term rent and utility assistance
 - B. Food insecurity and meal gap reduction
 - C. Reliable transportation access
- 2. Homelessness Prevention and Housing Stability**
 - A. Transitional and supportive housing
 - B. Housing navigation services
 - C. Legal support for housing stability
- 3. Mental Health and Meaningful Connections**
 - A. Mental health and substance use treatment access
 - B. Social isolation reduction opportunities
 - C. Crisis intervention and crisis advocacy
- 4. Quality, Affordable Child Care**
 - A. Sliding fee scale options for child care
- 5. Third Grade Literacy Assessment**
 - A. Evidence-based curriculum and wrap-around support for at-risk learners
 - B. Family barrier removal for literacy service access
- 6. Kindergarten Readiness**
 - A. Evidence-based programming for ages 3-5
 - B. Family engagement or parent-child interaction programming
- 7. Out of School Learning Opportunities**
 - A. Academic skill development and youth engagement
 - B. Participative learner reduction through financial and transportation support
- 8. Budget and Credit Counseling**
 - A. Representative group services for vulnerable populations

Approved by the United Way of Story County Board of Directors on May 30, 2023

COMMUNITY HEALTH NEEDS ASSESSMENT (CHNA)

HEALTH

1. Mental Health Services
2. Nutrition, Activity, & Weight
3. Substance Use Disorder
4. Cancer
5. Diabetes
6. Access to Health Care Services

SOCIAL DETERMINANTS OF HEALTH

1. Income & Poverty
2. Housing & Homelessness
3. Food Insecurity
4. Transportation



LIAISON ASSIGNMENTS AND VISITS

Every ASSET agency is required to host a liaison visit – September through early November

LIAISON VISIT

- Allow 1-2 hours for this visit
- Agencies should provide their FY 2027-28 budget information to Liaisons
- Liaison_Report_Form
- Director or CEO should focus on ASSET-funded programs:
 - Explain the programs/services and tour the facility
 - Introduce staff and summarize their functions
 - Discuss agency goals and objectives
 - Discuss issues that may impact financial situation of the agency
 - Give a preliminary review of FY 2027/28 ASSET budget information
 - Discuss program/service outcomes

BOARD OF DIRECTORS VISIT

Purpose for attending:

- Assess the role of the Board in managing the agency
- Determine how involved the Board is in the operations of the agency
- Allow board members to share their view of problems facing agency
- Liaisons are present to observe, not make presentations

REQUIRED DOCUMENTS

- Updated board member list – *Due Sept. 5, 2026*
- Board meeting dates/location/times for July 1, 2024-current and any scheduled meetings for July 1, 2026 - *Due Sept. 5, 2026*
- Board meeting minutes through July 2025 - *Due Sept. 5, 2026*
- Agency Audit/Financials and 990's – *Due 6 months following end of fiscal year*

Payment may be withheld from Funders until these items are received.

REQUIRED DOCUMENTS

All due by September 23 (submitted via e-CImpact)

- Budget Request
- Balance Sheet (ABF6)
- Sliding Fee if Applicable
- Strategic Plan if Applicable

BUDGET REQUEST TIPS

- Understand your ask
 - What % of the service cost are you asking for ASSET funds to cover?
 - How many people do you anticipate serving?
 - What were you allocated last year for ASSET? Why are you asking for a decrease/increase? What has changed?
 - What changes, if any, do you anticipate with the service in FY 2026/27 that may impact funding or services?

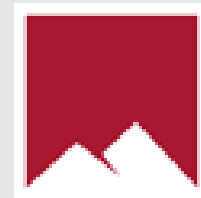
CLAIMS PROCESS

- **City of Ames** – Reimbursement request must be for services delivered within 90 days of the reimbursement request. Documentation showing proof of service being delivered to Ames residents is required. Access the claims form from the [Forms & Resources - Story County ASSET](#) webpage. Claims should be emailed to asset@cityofames.org.
- **Story County:** Reimbursement request must be for services delivered within 90 days of the reimbursement request. Documentation showing proof of service being delivered to Story County is required. Please contact Story County with additional questions.
- **ISU Student Government:** Reimbursement requests must be submitted within 30 days of the reimbursement request. Documentation showing proof of service being delivered to students, their spouses, and their dependents is required. Claims must be submitted via the Student Government website: [ASSET - Student Government](#).

CLAIMS PROCESS

- **United Way of Story County:** Agencies receiving funds will receive funds dispersed as indicated in your contract with United Way of Story County (monthly, quarterly or annually).
 - **For agencies on claims-based process:** Access the claims form from the [Forms & Resources - Story County ASSET](#) webpage.
- **ISU Student Government:**
 - **How to Submit:**
 - Visit stugov.iastate.edu.
 - Navigate to the **Funding Information** section and click on the **ASSET** link.
 - Use the electronic form to submit your invoice.
 - Submit **one month at a time** (multiple service codes for that month may be included).
 - Ensure all fields are filled out completely and accurately.
 - Your invoice will be routed to the ISU Student Government Administrative Assistant and Finance Director for verification and processing. You will receive an email copy of your submission immediately.

Outcomes – Clear Impact Scorecard



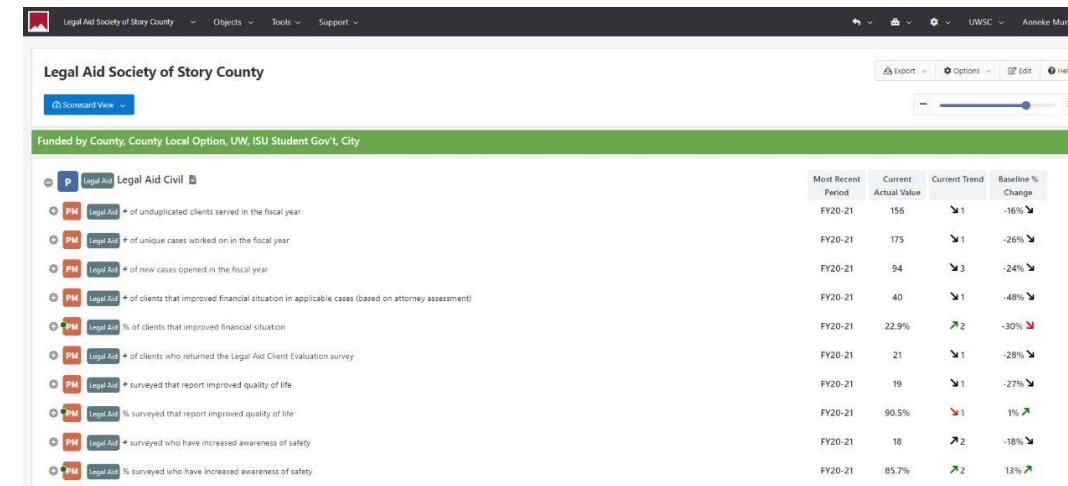
CLEAR IMPACT
reach your peak

WHAT IS CLEAR IMPACT SCORECARD?

- A data management software; online at <https://scorecard.clearimpact.com/>
- Costs shared by the City of Ames, Story County, & UWSC
- Each agency has its own Scorecard, with a separate section for each ASSET-funded program
- Reporting is part of the annual agency contract/agreement
- A powerful way to show community needs (ex: numbers served, wait lists)
- A clear way to track impact - the extent to which programs are impacting these needs
- A tool that helps streamline ASSET reporting (avoid duplication and extra work)

WHAT IS CLEAR IMPACT SCORECARD?

- ASSET Reference Manual – directions
- Toolkit for Partner Agencies – available through storycountyasset.org & www.uwstory.org/toolkit-partner-agencies
- Annual Scorecard “Bootcamp” (every June)
- 1:1 Technical Support or Onboarding New Staff
 - Email SMansell@uwstory.org to set up



	Most Recent Period	Current Actual Value	Current Trend	Baseline % Change
Legal Aid Civil				
# of unduplicated clients served in the fiscal year	FY20-21	156	1	-16%
# of unique cases worked on in the fiscal year	FY20-21	175	1	-26%
# of new cases opened in the fiscal year	FY20-21	94	3	-24%
# of clients that improved financial situation in applicable cases (based on attorney assessment)	FY20-21	40	1	-48%
% of clients that improved financial situation	FY20-21	22.9%	2	-30%
# of clients who returned the Legal Aid Client Evaluation survey	FY20-21	21	1	-28%
# surveyed that report improved quality of life	FY20-21	19	1	-27%
% surveyed that report improved quality of life	FY20-21	90.5%	1	1%
# surveyed who have increased awareness of safety	FY20-21	18	2	-18%
% surveyed who have increased awareness of safety	FY20-21	85.7%	2	13%

HOW IS SCORECARD DATA UTILIZED IN THE ASSET PROCESS?

1) Liaison Visits with Agencies:

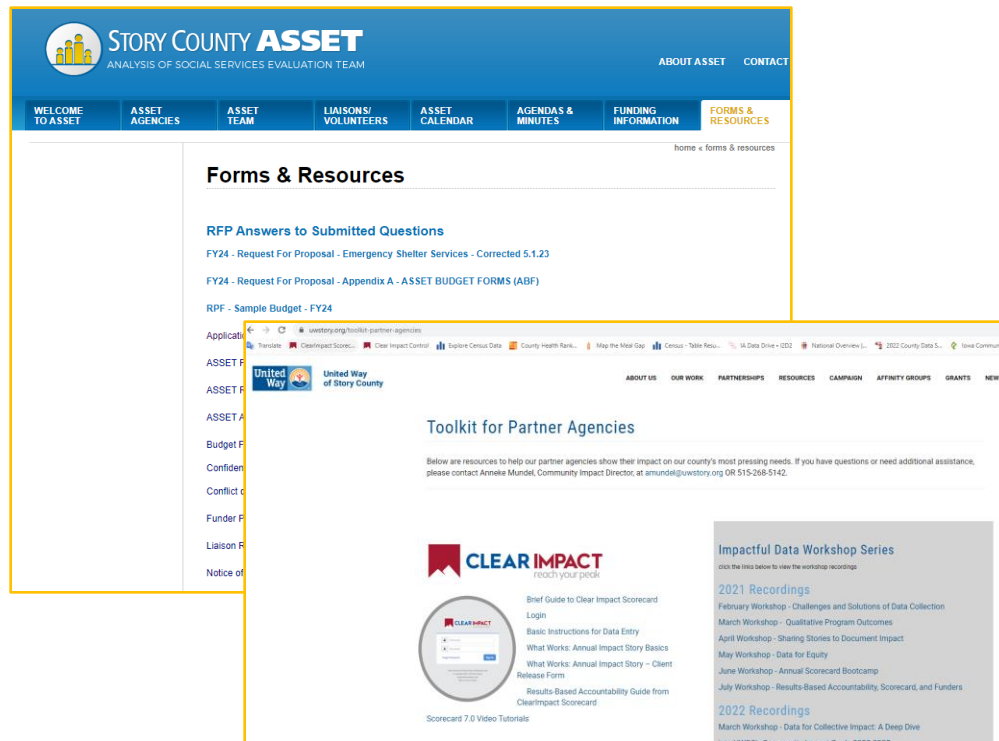
- ASSET Liaisons are encouraged to use their fall agency visits to ask about data changes, gaps, etc.

2) ASSET Work Teams (Education, Financial Stability, and Health):

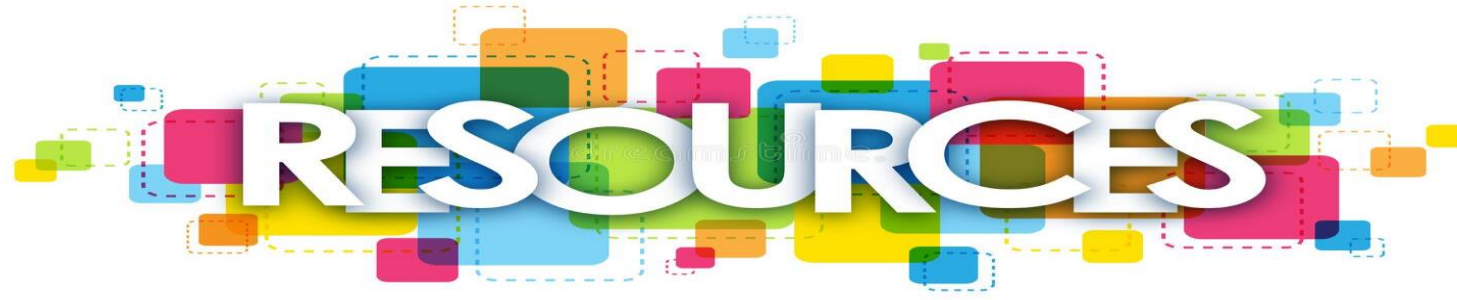
- Teams review data during the January work sessions as they determine program alignment with Funder priorities and efficacy.
- In fall, teams also meet to review previous year's data.



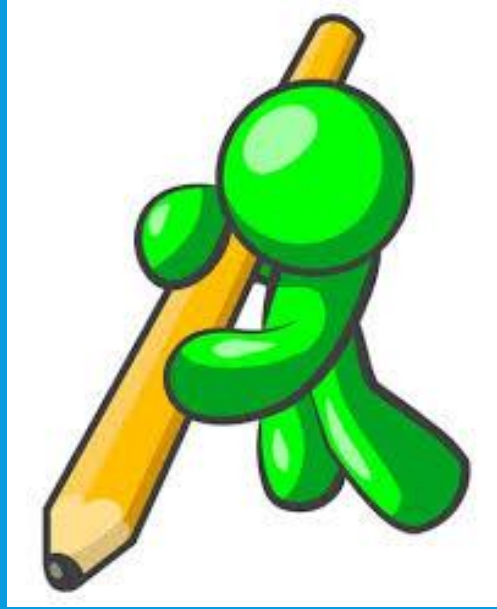
WHAT SCORECARD SUPPORTS ARE AVAILABLE?



- ASSET Reference Manual – directions
- Toolkit for Partner Agencies – available through storycountyasset.org & www.uwstory.org/toolkit-partner-agencies
- Annual Scorecard “Bootcamp” (every June)
- 1:1 Technical Support or Onboarding New Staff
 - Email SMansell@uwstory.org to set up



- ASSET Reference Manual
- Policies and Procedures
- Website (storycountyasset.org)
- Administrative Assistant
- Community Impact Director (Scorecard ONLY)



BUDGET FORMS



INTRODUCING...

- A web-based funding management system to support the annual ASSET process, including:
 - Budget requests
 - Documentation
 - Liaison reports
 - Events & meetings
 - And more to come!



For help with e-CImpact during the budget submission process,

[join Sarah's office hours:](#)

- Wednesday, August 12, 1-2 PM
- Monday, August 17, 10-11 AM
- Tuesday, August 25, 2-3 PM
- Thursday, September 3, 10-11 AM
- Thursday, September 10, 3-4 PM



AGENCY HEARINGS

In-Person Requirement

- Held January 6 & 7, 2027 @ 4:30 pm
- Agency representative(s) appear and give a 5-minute budget presentation followed by a 10-minute question and answer period
- Volunteers will have questions ready to ask agency representatives at the hearings
- Agency presentations should only cover services funded through the ASSET process, funding priorities, significant changes, new services, or other things that need further explanation



Questions... Call or Email:

- Claims – Individual Funder Staff
- ASSET meetings, process and related – ASSET Administrative Assistant (Jess)
- Scorecard – Community Impact Director (Sarah Mansell)
- E-CImpact – ASSET Support Staff (Sarah or Jess)

Questions?