

# ILLINOIS GFOA

ACHIEVING  
EXCELLENCE

*Together* 2019

IGFOA ANNUAL CONFERENCE • SEPTEMBER 8–10, 2019

## CONFERENCE SCHEDULE AND GUIDE

LEARNING • CONNECTING • PROGRESSING



ILLINOIS GOVERNMENT FINANCE OFFICERS ASSOCIATION

# SUSTAINING PARTNERS

GENERAL



**Recognizing that Sustaining and Associate Members are Truly Partners**

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Many thanks to the IGFOA Partners  
for their continuing support and collaboration.

## IGFOA Sustaining Partner Firms

Arthur J. Gallagher & Co.  
AXA Advisors  
Azavar Government Solutions, Inc.  
Baker Tilly Virchow Krause, LLP  
BMO Harris Bank N.A.  
Chapman and Cutler LLP  
Enterprise Fleet Management  
Federal Home Loan Bank of Chicago  
Fifth Third Bank  
Forecast5 Analytics, Inc.  
Illinois Metropolitan Investment Fund  
J.P. Morgan  
Katten Muchin Rosenman LLP  
MWM Consulting Group  
PFM  
PMA Financial Network, Inc.  
Sawyer Falduto Asset Management, LLC  
Sikich LLP  
Wintrust Government Funds  
Zions Bank

## IGFOA Associate Partner Firms

Amalgamated Bank of Chicago	Invoice Cloud
Asset Control Solutions Inc.	Johnson & Bell, Ltd.
BAIRD	Klein Hall CPAs
Bernardi Securities, Inc.	Lauterbach & Amen, LLP
BKD LLP	Miller Cooper & Co., Ltd
BS&A Software	Moody's Investors Service
Call One, Inc.	Piper Jaffray & Co.
Capital Gains Inc.	Plante Moran
CBIZ Valuation Group, LLC	Promontory Interfinancial
Civic Systems, LLC	Network, LLC
ClientFirst Technology Consulting	Raymond James
CliftonLarsonAllen LLP	RSM US LLP
Crowe Horwath LLP	S&P Global Ratings
First Bank Chicago, <i>A Division</i>	Selden Fox, Ltd.
<i>of First Bank of Highland Park</i>	Sonnenschein Financial
First Midwest Bank	Services, Inc
Foster & Foster	Speer Financial, Inc.
GovHR USA	Stifel
Graystone Consulting	The Horton Group
GW & Associates, PC	Third Millennium Associates, Inc.
Huntington National Bank	Tyler Technologies, Inc.
Ice Miller LLP	Waterworth
Illinois Public Risk Fund	Wells Fargo Bank, NA
InfoSend	

## Dear IGFOA Colleagues:

Welcome to the 2019 IGFOA Annual Conference in Bloomington-Normal! The Annual Conference Program will offer 35 educational sessions to more than 380 attendees and 62 exhibitors. New to this year's Annual Conference program are six roundtable breakout sessions designed to provide meaningful focus group discussions on relevant topics.

The Annual Conference always provides the opportunity to be inspired by our keynote speakers. New this year is the Sunday Keynote Speaker: Tom Rooney, Economic and History Teacher (and former elected official). Join Tom at his session on "Financial Leadership – Excellence Can Only Be Achieved By You!". The Monday morning Keynote speaker is former Navy Seal and NCAA Division 1 athlete, Jason Kuhn, with a message on "The Fundamentals of Winning – For Each Other". Jason will challenge us to become our best individually and as a team with his combat-tested principles.

Throughout this Conference and in the next year, stay engaged with IGFOA and your network of peers. IGFOA continues to strive towards offering relevant, timely and quality training with a focus on best practices. The Annual Conference is a great way to grow, connect and learn from your colleagues in formal and informal settings. You, as government finance officers, will come together to share the vision, knowledge and experience to help achieve financial excellence together!

If time allows, take a moment to discover all the Bloomington-Normal area has to offer, including a variety of excellent dining, shopping and entertainment options. For more information, visit <http://visitbn.org>.

It is because of you, the Executive Board, volunteers, members, partners and staff, that IGFOA achieves its mission to "promote excellence in governmental finance". Thank you for attending the Annual Conference, and thank you to the Conference Planning Team and all the volunteers who have given of their time, effort, and expertise to make this year's Annual Conference a success.

Be sure to follow the Conference via the 2019 IGFOA Mobile App to stay up-to-date with Conference and activities!

It has been an honor to serve as your 2018-19 IGFOA President. I look forward to seeing you during the 2019 IGFOA Annual Conference!



Melissa Gallagher  
IGFOA President  
2018–2019

Sincerely,

A handwritten signature in black ink that reads "Melissa Gallagher".

Melissa Gallagher  
IGFOA President  
Finance Director  
City of Rolling Meadows

# CONFERENCE INFORMATION

## Registration Hours

Attendee check-in and registration will take place at the Bloomington-Normal Marriott Hotel & Conference Center during the hours below. All attendees and exhibitors should check in to pick up their Conference materials.

Sunday, September 8	10:00 AM – 6:30 PM
Monday, September 9	8:00 AM – 4:00 PM
Tuesday, September 10	7:30 AM – 11:00 AM

## Name Badges

Conference attendee and exhibitor name badges are included in the Conference materials. Attendees and exhibitors are required to wear name badges for admittance to all educational sessions, breakfasts, the Annual Business Meeting, luncheon, and social events.

New members and first-time attendees are wearing Gold ribbons on their badges. If you meet attendees with a Gold ribbon, be sure to welcome them to the IGFOA Annual Conference!

## Vendor Showcase

The Vendor Showcase is located in the Redbird Ballroom CD of the Bloomington-Normal Marriott Hotel & Conference Center. This is an excellent opportunity to meet exhibitors offering services of interest to your government all in one location. Take advantage of this dedicated time to learn more about the exhibiting companies and enter a variety of raffle drawings for special prizes! See page 29 for more on the Vendor Showcase.

Sunday, September 8	5:00 PM – 6:30 PM
Monday, September 9	9:30 AM – 12:30 PM
Monday, September 9	1:30 PM – 6:15 PM*

\*Raffle drawings at 6:00 PM

## Bloomington-Normal Marriott Hotel & Conference Center WIFI

Complimentary WIFI is available in the Bloomington-Normal Marriott Hotel & Conference Center for attendees and exhibitors.

Network: Marriott Conference  
Password/code: IGFOA2019

# CONFERENCE INFORMATION

## Mobile App

To enhance your Conference experience, download IGFOA's Annual Conference App, **IGFOA 2019 Annual Conference** from the Apple App Store for iPad and iPhone and from Google Play for Android. The Mobile App allows you to view the schedule, Conference sessions, exhibitors, and speaker details. Additionally, users can share information with attendees and colleagues with in-app messaging.



*Scan to download*

GENERAL

The App will post notices of last-minute changes to the program, Vendor Showcase, social events and other important information.

Be sure to share your Conference photos with colleagues by uploading them to the Mobile App. Pictures must be taken in portrait format to upload to the App.

## Breakfasts, Annual Business Meeting, and Luncheon

Breakfast on Monday and Tuesday and the Annual Business Meeting and Luncheon on Monday is open to all attendees and exhibitors. A name badge is necessary for admittance to all meals. These are great opportunities to network with other government finance professionals.

## Complimentary Beverage Service and Break Food

Complimentary coffee, tea, soda, and water are available throughout the day during the Conference. Break food and beverages are available during breaks from the educational sessions on Monday and Tuesday.

### Sunday, September 8

Beverages will be available in the session rooms.

### Monday, September 9

Beverages and break food will be available in the back of the Vendor Showcase. New this year: Dessert from the luncheon will be served from 2:35 PM to 3:00 PM during the afternoon break in stations throughout the Vendor Showcase.

### Tuesday, September 10

Beverages will be available in the pre-function area outside of Redbird Ballroom.

# CONFERENCE INFORMATION

## GENERAL

### **President's New Member and First-Time Attendee Reception**

Invitations to the **President's New Member and First-Time Attendee Reception** were mailed to new IGFOA members and first-time Conference attendees prior to the Conference. Join Melissa Gallagher, IGFOA President, and the Membership Committee for a fun and informative event.

The Reception is Sunday, September 8, 4:00 – 5:00 PM in the Bloomington-Normal Marriott Hotel & Conference Center – Jesse Fell A. The Jesse Fell A Room is located on the second level.

### **Partner and Exhibitor Happy Hour**

Not a new IGFOA member or first-time Conference attendee? IGFOA Partners and exhibitors will host an informal happy hour in the Vendor Showcase on Sunday, September 8, 4:00 PM – 4:45 PM. All attendees are welcome!

### **Optional Dinner Alternative on Sunday, September 8: IGFOA Hospitality Room**

Are you a public sector attendee, Partner, or exhibitor with no dinner plans for Sunday, September 8? Join IGFOA staff and other Conference attendees for a complimentary dinner buffet.

The Hospitality Room is in the Bloomington-Normal Marriott Hotel & Conference Center, Redbird FG, 6:30 PM – 9:00 PM.

### **Shuttle Service for Monday Night Social Event**

IGFOA will provide courtesy shuttle service through Peoria Charter for the Monday night social event at Destihl Brewery. The shuttle will provide continuous roundtrip service between the Bloomington-Normal Marriott Hotel – Broadway Street entrance and the Destihl Brewery beginning at 6:25 PM and ending at 10:00 PM.

### **Cellular Phones**

As a courtesy to our speakers and to other Conference attendees, please turn your cell phone to vibrate or off during all Conference sessions and meals.



## IGFOA to Offer Complimentary Headshots

The IGFOA is sponsoring professional headshots for all attendees to be posted on the IGFOA website. The headshots may be used for other professional purposes such as on LinkedIn profiles or government websites. Please note that Executive Board members, Chapter Boards, Committee Chairs, and Committee members are required to have a headshot taken for the website.

Plan to have your headshot taken on Monday, September 9 anytime between 2:00 PM and 5:30 PM in the Bloomington-Normal Marriott Hotel & Conference Center – Fell A. The Fell A Room is located on the second level.

## IGFOA Booth Bingo!

Play IGFOA Booth Bingo on Sunday, September 8 and Monday, September 9. An 8X10 Bingo card can be found in your registration packet. Take your card and visit the Exhibitors' booths in the Vendor Showcase. Be sure to get a round sticker that matches the number of the booth and place it on that same number square on your card. When you have a Bingo, take your card to a member of the Partners' Forum or a Roving Bingo Ticketer to redeem your Bingo for raffle tickets. Drop your tickets in raffle boxes placed throughout the Vendor Showcase for a chance to win one of a variety of prizes.

On Monday, September 9, be sure to redeem your Bingos for tickets by 3:00 PM and drop your tickets in raffle boxes by 5:45 PM. Drawings will take place in the Vendor Showcase at 6:00 PM. **YOU MUST BE PRESENT TO WIN AND ONLY ONE PRIZE PER GAME PARTICIPANT.**

Prizes this year include: Tailgate Grilling basket with Smokey Joe Grill, Two – \$100 Lettuce Entertain You gift cards, Williams Sonoma Best of Italy gift basket, Paramount Theater 2019–20 Season tickets for the Broadway Series: *Newsies*, *Beauty and the Beast*, *The Secret of My Success*, and *Kinky Boots*, Two Chicago Cubs game tickets, Two Chicago White Sox game tickets – Club Level with Parking, Vera Bradley Large Travel Duffle, Beats Pill+ Portable Bluetooth Speaker, Apple AirPods with charging case, and Lilly Pulitzer Getaway Packable Tote... plus a variety of consolation prizes.

# CONFERENCE INFORMATION

## Conference Planning Team

Thank you to the members of the Conference Planning Team for working hard to ensure the best possible Conference experience for attendees.

Feel free to let the Team know your thoughts about the 2019 Annual Conference and what you would like to see at the 2020 Annual Conference. Interested in joining the Conference Planning Team? Contact Jennifer Johnson, Chair, at [jennifer.johnson@champaignil.gov](mailto:jennifer.johnson@champaignil.gov)

Melissa Gallagher, Executive Board President  
*Finance Director, City of Rolling Meadows*

Bill Hannah, Executive Board Vice President and Annual Conference Chair  
*Finance Director, Village of North Aurora*

Tricia Dubiel, Professional Education Committee, Executive Board Liaison  
*Superintendent of Business & Finance, Bolingbrook Park District*

Kevin Wachtel, Executive Board Secretary, Team Member  
*Finance Director, Village of Villa Park*

Rachel Musiala, Chair, Professional Education Committee  
*Finance Director, Village of Hoffman Estates*

Jennifer Johnson, Conference Planning Team Chair  
*Administrative Services Supervisor, City of Champaign*

Nick Bava, Team Member  
*Senior Manager, Sikich LLP*

Susan Jones, Team Member  
*Principal, Miller Cooper & Co., Ltd.*

Mike Malatt, Team Member  
*Senior Manager, Baker Tilly Virchow Krause, LLP*

Emma Montagu, Team Member  
*Senior Vice President/Treasury Management, First Bank Chicago, A Division of First Bank of Highland Park*

Ethan Salsinger, Partners' Forum Liaison  
*Great Lakes Regional Director – Public Sector, Arthur J. Gallagher & Co.*

Brian Smith – Team Member  
*Assistant Director of Finance, Village of Wheeling*

## CPE Credits

IGFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

National Registry of CPE Sponsors  
150 Fourth Avenue North, Suite 700  
Nashville, TN 37219-2417



## Continuing Professional Education (CPE) Credits

Attendees wishing to receive CPE credit for qualifying educational sessions must comply with the requirements as established by NASBA. Accordingly, attendees must complete the CPE form handed out by CPE monitors at the beginning of the session and return the completed form to a CPE Monitor before leaving the session room.

A record of your CPE credits will be posted to your profile on the IGFOA website [www.igfoa.org](http://www.igfoa.org) in approximately six weeks. Please note that the Roundtable sessions on Monday, September 9, 2019 do not qualify for CPE due to the participant-driven discussion format.

# SUNDAY AT A GLANCE

## Conference Registration

10:00 AM – 6:30 PM

## Speaker Ready Room

10:00 AM – 3:00 PM, North Street Meeting Room

## Ethics Session

11:00 AM – 12:15 PM, Redbird EFG

## Informal Lunch and Networking

Noon – 1:00 PM, Fell A

## Football Tailgate

1:00 PM – 3:15 PM, Fell B

**Concurrent Sessions** 1:00 PM – 1:50 PM

**Concurrent Sessions** 2:00 PM – 2:50 PM

## **SUNDAY KEYNOTE: Tom Rooney, Financial Leadership – Excellence Can Only Be Achieved By You!**

3:00 – 3:50 PM, Redbird EFG

## **President's New Member & First Time Attendee Reception**

4:00 – 5:00 PM, Fell A

## **Sustaining and Associate Partners' & Exhibitors' Happy Hour** (Public Sector Members Welcome)

4:00 – 5:00 PM, Redbird CD

## **Vendor Showcase Welcome Reception**

5:00 – 6:30 PM, Redbird CD

**Networking dinner on your own** or optional dinner alternative: **IGFOA Hospitality Room**  
6:30 – 9:00 PM, Redbird EFG

*Unless noted otherwise all events are held at the Bloomington/Normal Marriott Hotel and Conference Center. IGFOA reserves the right to modify the agenda and/or speakers.*

SUNDAY

Sunday, 11:00 AM – 12:15 PM

## Statutory Requirements and Ethical Considerations for Public Officials

**Room: Redbird EFG ■ About 1.5 CPE ■ Regulatory Ethics –Technical**

Learn about the key provisions of the Public Officer Prohibited Activities Act, the State Officials and Employees Ethics Act, including the Gift Ban, and the Local Government Travel Expense Control Act. The session will also examine the elements of criminal liability arising under Criminal Code Articles 33 (Official Misconduct) and 33E (Public Contracts). Lastly, it will briefly survey the various immunities afforded public bodies and public officials under the Local Governmental and Governmental Employees Tort Immunity Act. These statutory provisions will be integrated with common law concepts and recommendations for best practices to provide attendees with a comprehensive overview of the duties and standard applicable to their positions.

**Speakers: Samuel B. Cavnar**, Partner, Robbins Schwartz, **M. Neal Smith, Jr.**, Partner, Robbins Schwartz

**Moderator:** Elizabeth Holleb, Director of Finance and Information Technology, City of Lake Forest

### CONCURRENT SESSIONS SUNDAY 1:00 PM – 1:50 PM

Sunday, 1:00 PM – 1:50 PM

## Borrowing with Bonds: New SEC Rules and Related Practical Considerations

**Room: Redbird A ■ About 1.0 CPE ■ Finance – Technical**

This session will discuss how the federal securities laws generally impact municipal bond offerings, including the role of the Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB). It will also discuss the recent amendments to SEC Rule 15c2-12 regarding continuing disclosure, including how the municipal bond industry has responded to the amendments and what finance officers can expect moving forward.

**Speakers: Raphaliata McKenzie**, Sr. Vice President, Speer Financial, Inc., **Kevin O'Kelly**, Vice President, Public Finance, Raymond James & Associates, Inc., **Gloria Osborn**, Director of Finance & IS, City of Galesburg, **Larry White**, Partner, Chapman and Cutler LLP

**Moderator:** Chris Black, Business Manager, Rock River Reclamation District

# SUNDAY SEPTEMBER 8

Sunday, 1:00 PM – 1:50 PM

## Using Ratios and Other Indicators to Assess Fiscal Well Being

**Room: Normal Theater ■ About 1.0 CPE ■ Finance – Technical**

Understanding how to interpret financial information can help with assessing a local government's financial condition, with making better budgeting decisions, and improving the strategic management of municipal finances. This session will explore how to look at "financial condition" as a broad concept and how to utilize the numbers in financial statements to measure financial indicators.

Topics include:

- Financial condition
  - ▶ Cash solvency
  - ▶ Budgetary solvency
  - ▶ Long-term solvency
  - ▶ Service level solvency
- How to know if a government's financial position is deteriorating or improving?
  - ▶ Financial indicators
  - ▶ Non-financial data
  - ▶ Internal vs. external data
- Practical considerations
  - ▶ Cost of analysis
  - ▶ Adaptability of approach
  - ▶ Buy-in

**Speakers: Joe Kowalski**, CPA, Partner, Plante Moran,  
**Shawana Jackson**, CPA, Associate, Plante Moran

Moderator: Jenni Booth, CPA, Finance Director, Village of Frankfort

Sunday, 1:00 PM – 1:50 PM

## Shared Services for Technology: Opportunities and Challenges to Maximizing Taxpayer Value

**Room: Redbird B ■ About 1.0 CPE ■ Information Technology – Technical**

Shared services for technology are an increasingly popular option as local governments are challenged to provide great service with shrinking budgets. Delve into technological-related shared service types and ideas, steps to take, and challenges to consider.

**Speaker: Marc Thorson**, Executive Director of Regional Technology Services, Northern Illinois University

Moderator: Scott Bordui, CPA, CGMA, Finance Director, Village of Flossmoor

## CONCURRENT SESSIONS SUNDAY 2:00 PM – 2:50 PM

Sunday 2:00 PM – 2:50 PM

### Understanding New Changes to the Minimum Wage Law and Other Wage-Related Statutes

**Room: Redbird A ■ About 1.0 CPE ■ Finance – Technical**

This session will explain the key amendments to the Minimum Wage Law, which take effect on January 1, 2020. This will include a review of the forthcoming wage increases, and a review of the new penalties and liability arising from violations of the IMWL's wage and record-keeping requirements. These changes will be reviewed in-depth along with an update on other wage-related statutes, regulations, and court decisions, including recent changes to the Government Severance Pay Act and the Wage Payment and Collection Act, and the coming changes to the Equal Pay Act.

**Speaker: Frank B. Garrett**, Partner, Robbins Schwartz.

**Katelin J. Eastman**, Associate, Robbins Schwartz

Moderator: Andrea Chiappetta, Director of Finance & Personnel, Lombard Park District

Sunday 2:00 PM – 2:50 PM

### Investment Accounting and Reporting Meets Strategy

**Room: Normal Theater ■ About 1.0 CPE ■ Accounting – Technical**

Do you find little time in your schedule to develop and then effectively communicate investment strategy? These challenges are common and can lead to more time spent at year-end performing the financial statement close. Proper interim reporting of investments can lead to an enhanced understanding of investment yields and returns by management and the Board of Trustees and a more aligned investment strategy. This session will help attendees understand accounting and disclosures related to investments, including GASB 72 & 79, as well as enhanced understanding of new investments allowed under the Public Funds Investment Act.

**Speakers: Brian Hextell**, SVP, Institutional Portfolio Manager, Prudent Man Advisors, LLC, **Susan R. Jones**, Principal, Government Services Group, Miller Cooper & Co., Ltd.

Moderator: Christina Fisher, CPA, Finance Director, City of Markham

# SUNDAY SEPTEMBER 8

Sunday: 2:00 PM – 2:50 PM

## Defending Your Organization Against Cyber Thugs

**Room: Redbird B ■ About 1.0 CPE ■ Information Technology – Technical**

Learn about the common tactics used by malicious individuals to exploit vulnerabilities in systems and the human elements of an organization for the misappropriation of financial information for personal gain. Attendees will be provided with information that will allow them to begin the process of developing defensive strategies through planning and implementation based on the unique needs of their organizations.

**Speaker: Lee Painter**, CISSP, CRISC, HCISPP, CCSFP, Principal, CliftonLarsonAllen

**Moderator: Tia Incapreo**, Senior Account Executive, Arthur J. Gallagher & Co.

Sunday: 3:00 PM – 3:50 PM



## Financial Leadership – Excellence Can Only Be Achieved by You!

**Room: Redbird EFG ■ About 1.0 CPE ■ Personal Development – Non-Technical**

The history of government management shows that the achievement of excellence is entrusted to the staff, not solely to elected officials. The general public, meanwhile, only seems to consider the issues of excellence (if ever) on the biannual cycle of elections. The basics of economics show that local government must have its own avenues to excellence, developed uniquely from within. However, most of the public we serve still voices general agreement with the ill-considered platitude “government should be run like a business.” Mr. Tom Rooney, an educator and former elected official, will make the case that 1) local government staff are the ones truly charged with achieving excellence, 2) the effort to run like a business can never yield excellence in local government, and 3) excellence in local government can only be achieved by the professionals creating sustainability together with elected officials and citizens.

**Speaker: Tom Rooney**, Economics and History Teacher, Leyden High School District 212

**Moderator: Melissa Gallagher**, Finance Director, City of Rolling Meadows



# MONDAY AT A GLANCE

## Conference Registration

8:00 AM – 4:00 PM

## Speaker Ready Room

7:30 AM – 4:30 PM, North Street Meeting Room

## Buffet Breakfast

7:45 AM, Redbird EFG

**Welcome and GFOA Update – GFOA President-Elect, Marion M. Gee, Redbird EFG**

**KEYNOTE: Jason Kuhn, The Fundamentals of Winning – “For Each Other”**

8:30 AM – 9:20 AM, Redbird EFG

## Vendor Showcase Open

9:30 AM – 12:30 PM, Redbird CD

**Concurrent Sessions** 9:30 AM – 10:20 AM

**Concurrent Sessions** 10:40 AM – 11:30 AM

**Roundtable Sessions** 11:40 AM – 12:20 PM

## Luncheon and Annual Business Meeting

12:30 – 1:30 PM, Redbird EFG

## Complimentary Headshots

2:00 – 5:30 PM, Fell A

## Vendor Showcase Open

1:30 AM – 6:15 PM, Redbird CD

**Concurrent Sessions** 1:45 PM – 2:35 PM

## Dessert in the Vendor Showcase

2:35 PM – 3:00 PM, Redbird CD

**Concurrent Sessions** 3:00 PM – 4:15 PM

**Concurrent Sessions** 4:25 PM – 5:15 PM

## Vendor Showcase Closing Reception

5:15 – 6:15 PM, Redbird CD

**Social Event** at Destihl Brewery 6:45 – 10:00 PM, 1200 Greenbriar Dr., Normal, IL 61761 – shuttles begin at 6:25 PM, Marriott Hotel Broadway Street entrance

## Breakfast, Annual Business Meeting, and Luncheon

Breakfast and the Annual Business Meeting and luncheon on Monday are open to all attendees and exhibitors. A name badge is necessary for admittance to all meals.

*Between all Monday sessions, beverages and break food are available in Redbird CD.*

*Unless noted otherwise all events are held at the Bloomington/Normal Marriott Hotel and Conference Center. IGFOA reserves the right to modify the agenda and/or speakers.*

# MONDAY SEPTEMBER 9

Monday 8:00 AM – 8:30 AM



## WELCOME – Welcome and GFOA Update

**Room: Redbird EFG**

GFOA President-Elect Marion M. Gee welcomes attendees to the 2019 IGFOA Annual Conference and provides insights on GFOA projects and initiatives.

**Speaker: Marion M. Gee**, GFOA President-Elect and Finance Director, Metropolitan St. Louis Sewer District

Monday 8:30 AM – 9:20 AM



## KEYNOTE – The Fundamentals of Winning – “For Each Other”

**Room: Redbird EFG ■ About 1.0 CPE ■ Personal Development – Non-Technical**

The Fundamentals of Winning “For Each Other” is a mental toughness, leadership development, and team culture program. It covers 10 fundamental skills sets proven to increase performance based on the experience of a former college athlete, Navy SEAL Team Lead, with a M.S. in Global Leadership.

**Speaker: Jason Kuhn**, “For Each Other” Stonewall Solutions  
Moderator: Kevin Wachtel, Finance Director, Village of Villa Park

### CONCURRENT SESSIONS MONDAY 9:30 AM – 10:20 AM

Monday 9:30 AM – 10:20 AM

## New Developments and Credit Trends in the Illinois Municipal Bond Market

**Room: Redbird A ■ About 1.0 CPE ■ Finance – Technical**

This session will discuss relevant financing and credit trends in the municipal bond market, including recent federal and state legislation, legal developments, and expenditure and revenue trends.

**Speakers: Stephen Adams**, Director, Public Finance, PMA Securities, LLC, **Andrew Kim**, Director, Public Finance, PMA Securities, LLC, **David Levett**, Vice President – Senior Analyst, Moody’s Investors Service

Moderator: Mary G. Dankowski, MBA, CPA, Retired Finance Director and Deputy Village Manager from Village of Park Forest

Monday 9:30 AM – 10:20 AM

## Fraud, Fraud, Everywhere: Stories from the Fraud Frontline!

**Room: Normal Theater ■ About 1.0 CPE ■ Auditing – Technical**

Fraud can happen anywhere at any time. Even the smallest fraud can cause big problems. Don't let your government become the next victim. Uncover the most common types of fraud and how they occur. Learn how to detect existing frauds and understand how internal controls can reduce the risk of fraud in the future.

**Speaker: Michael E. Malatt**, CPA, Senior Manager, Baker Tilly Virchow Krause, LLP

**Moderator: Nikki Larson**, CPA, CPFO, Finance Director, Village of Glencoe

Monday 9:30 AM – 10:20 AM

## It's Not Just Math: How Water Rates Drive Policy and Shape Your Community's Future

**Room: Redbird B ■ About 1.0 CPE ■ Business Management & Organization – Non-Technical**

Setting water rates is challenging, but it's not just a mathematical problem. When communities increase rates or make changes to the rate structure itself, they implicitly move a cluster of different policy drivers. These decisions shape how water systems perform, and ultimately what our communities will be like in the future. Key drivers include:

- revenue sufficiency – is there enough to run the system now and forever?
- revenue stability – is the revenue stream consistent from year to year?
- simplicity – do residents understand how they are being charged? Or why?
- affordability – are rates as low as they can be?
- sustainability – are we encouraging using water efficiently?
- equity – are customers and customer classes being charged fairly?

This session will share ideas about how to use water rates to drive a community's policy goals. Along the way, it will provide useful tips and links to resources that will make the whole rate setting process less work and less of a hassle.

**Speaker: Kirk Stinchcombe**, CEO, Waterworth

**Moderator: Paul Christensen**, CPA, CPFO, Assistant City Manager/Finance Director, City of Woodstock

## CONCURRENT SESSIONS MONDAY 10:40 AM – 11:30 AM

Monday 10:40 AM – 11:30 AM

### The Basics of Bonds for Park Districts and Non-Home Rule Communities

**Room: Redbird A ■ About 1.0 CPE ■ Finance – Technical**

Panelists will discuss the options, steps, and parties involved in a typical bond transaction for a non-home rule issuer in Illinois.

**Speakers:** **Jon Beckmann**, MBA, CPRP, Superintendent of Finance & Admin, Waukegan Park District, **Dan Forbes**, President, Speer Financial, Inc., **Seema G. Patel**, Senior Counsel, Chapman and Cutler LLP, **Dalena Welkomer**, Senior Vice President, Baird Public Finance

**Moderator:** Patrice Sutton, Finance Director, Lake County

Monday 10:40 AM – 11:30 AM

### Accounting for TIFs

**Room: Normal Theater ■ About 1.0 CPE ■ Accounting (Governmental) – Technical**

This session will discuss the nuances of accounting for tax increment finance (TIF) districts.

**Speakers:** **John Cutrera**, Director, BKD, LLP, **Scott Termine**, Partner, BKD, LLP

**Moderator:** Sandy Evans, MPA, Director of Finance, City of O'Fallon

Monday 10:40 AM – 11:30 AM

### Blockchain: Preparing for Disruption

**Room: Redbird B ■ About 1.0 CPE ■ Information Technology – Technical**

Blockchain is one of the most hyped technologies this year. Is it all just hype, or is there more to it? This session will walk through what blockchain is, how it works, and its impact on state, county and local governments. Learn about the different use cases for blockchain technology including car titles, deeds, and other official documents.

**Speaker:** **Jay Schulman**, RSM US LLP

**Moderator:** Andrew Brown, Deputy Director of Finance, Village of Buffalo Grove

## ROUNDTABLES MONDAY 11:40 AM – 12:20 PM

Monday 11:40 AM – 12:20 PM

### Roundtable 1:

#### The GFOA's CPFO Certification Program

**Room: Fell B**

The GFOA's Certified Public Finance Officer (CPFO) certification program is a great educational opportunity to sharpen skills in relevant topics. Come to this informal session to learn more about the program or to share success stories in achieving the CPFO designation. It is an opportunity to learn about the program, get some study tips, and/or network with other CPFO's.

**Facilitators:** **Julie Ciesla**, MBA, CPFO, Assistant Chief Financial Officer, Peoria County, **Kristin N. Kazenas**, Chief Financial Officer/Human Resources Director, Village of Hawthorn Woods, **Patrice Sutton**, Finance Director, Lake County, **Laurel Warren**, Fiscal Operations Manager, Village of Hoffman Estates

### Roundtable 2:

#### Park Districts: What are the Current Issues You're Dealing With... Or Should Be?

**Room: Fell A**

This roundtable will address topics of interest to Park Districts. The format is open and intended to be an exchange of questions amongst the group. Some topics to be discussed include:

1. Gift card balances & household credit policies or practices – minimizing unclaimed property
2. Minimum wage impacts
3. Tips on reporting exempt employees time
4. GATA implementation challenges
5. Succession planning and actually preparing for succession
6. Health insurance management
7. ALICE training or similar methods of training
8. Budget issues popping up on the horizon
9. New statutory changes Park Districts are dealing with

**Facilitators:** **Tricia Dubiel**, Superintendent of Business and Finance, Bolingbrook Park District, **Rita A. Trainor**, Finance Director, Wheaton Park District

# MONDAY SEPTEMBER 9

Monday 11:40 AM – 12:20 PM

## Roundtable 3:

### County Revenues and Cost Drivers

**Room:** Fell C

This session will generate a discussion about current sources of county revenue and the adequacy of those sources to offset existing spending pressures. Participants will be asked to evaluate the stability of current revenue sources and offer suggestions about potential revenue sources that remain untapped. Participants will also discuss whether any trends exist with respect to cost drivers affecting county budgets.

**Facilitator:** **Joe McCoy**, Executive Director, Illinois State Association of Counties

Monday 11:40 AM – 12:20 PM

## Roundtable 4:

### Utility Billing Challenges for Finance Directors

**Room:** Redbird B

This participant-driven discussion will focus on challenges, concerns, solutions, observations, and experiences of Finance Directors and their municipal utility billing operations. Various policy decisions that impact utility billing departments will be discussed, such as billing, write-offs, shut-offs, collections, liens, water rates, and long-term financial sustainability. Participants should come prepared with their own challenges and success-stories.

**Facilitators:** **Melissa Gallagher**, Finance Director, City of Rolling Meadows, **Rachel Musiala**, Finance Director, Village of Hoffman Estates, **Kevin Wachtel**, Finance Director, Village of Villa Park

Monday 11:40 AM – 12:20 PM

## Roundtable 5:

### Millennials in Public Finance

**Room:** Beaufort

Participate in an open discussion of successes/failures in applying acquired knowledge on Millennials and how to define or manage Millennials. Potential topics for discussion include unique characteristics of Millennials, personal experiences, how to communicate and provide feedback, and the trend among Millennials to value a current work/life balance over long-term benefits.

**Facilitators:** **Andrew Brown**, Deputy Director of Finance, Village of Buffalo Grove, **Brian Smith**, Assistant Director of Finance, Village of Wheeling

Monday 11:40 AM – 12:20 PM

## Roundtable 6:

### Mental Toughness, Leadership, and Team First: Continuing the Conversation with Jason Kuhn

**Room:** Redbird A

Have questions for Jason Kuhn after his keynote presentation? Join Jason for Q&A and a discussion on how to apply the 10 fundamental skill sets.

**Facilitator:** Jason Kuhn, “For Each Other” Stonewall Solutions

## CONCURRENT SESSIONS MONDAY 1:45 PM – 2:35 PM

Monday 1:45 – 2:35 PM

### Factors Impacting the Rate Environment – Implications for Illinois Public Funds Investors

**Room:** Redbird A ■ **About 1.0 CPE** ■ **Finance – Technical**

Today’s economic environment is one characterized by moderate economic growth and filled with market participants questioning the sustainability of the current period of expansion. This session we will explore the current state of the economy, the factors that impact its growth potential, the potential impact that they have on the rate environment, and what it means for public funds investors in Illinois.

**Speaker:** Kyle Jones, Managing Director, PFM Asset Management LLC

**Moderator:** Elizabeth (Beth) Beaty, Administrative Services Manager, City of Urbana

Monday 1:45 – 2:35 PM

### GASB Update – Part 1

**Room:** Normal Theater ■ **About 1.0 CPE** ■ **Accounting (Governmental) – Technical**

The Governmental Accounting Standards Board (GASB) exists to establish and improve accounting and financial reporting standards for state and local governments in the United States. This session will describe the major tenets of GASB Statements 83, 84, and 88.

**Speakers:** Brian W. Caputo, Ph.D., CPA, CPFO, Board Member, GASB, and President, College of DuPage, IL, Frederick G. Lantz, CPA, Partner-in-Charge, Government Services, Sikich LLP

**Moderator:** Christina Coyle, CPA, Finance Director, Village of Glen Ellyn, IGFOA – TARC Chair

# MONDAY SEPTEMBER 9

Monday 1:45 – 2:35 PM

## Online Payments – Self-Reported Taxes

**Room: Redbird B ■ About 1.0 CPE ■ Information Technology – Technical**

As citizens and businesses become accustomed to making payments online, the demand for governments to provide online payment options has grown. However, accepting online payments for Self-Reported Taxes, such as food and beverage taxes, has always been a challenge as the amount to be paid is unknown until the tax return is filed. This session will walk through the steps necessary for accepting online payments with a focus on accepting payments for Self-Reported Taxes.

**Speakers: Kay Nees**, Finance Director, City of Champaign, **Jennifer Johnson**, Administrative Services Supervisor, City of Champaign

**Moderator: Susan A. Wade**, Vice President – Public Funds, First Midwest Bank

### CONCURRENT SESSIONS MONDAY 3:00 PM – 4:15 PM

Monday 3:00 – 4:15 PM

## GASB Update – Part 2

**Room: Normal Theater ■ About 1.5 CPE ■ Accounting (Governmental) – Technical**

The Governmental Accounting Standards Board (GASB) exists to establish and improve accounting and financial reporting standards for state and local governments in the United States. This session will describe the major tenets of GASB Statements 87, 89, 90, and 91.

**Speakers: Brian W. Caputo**, Ph.D., CPA, CPFO, Board Member, GASB, and President, College of DuPage, IL, **Frederick G. Lantz**, CPA, Partner-in-Charge, Government Services, Sikich LLP

**Moderator: Bill Hannah**, MPA, CPFO, Finance Director/Treasurer, Village of North Aurora, Executive Board Liaison – TARC

Monday 3:00 – 4:15 PM

## Planning and Responding to Active Shooter/Violent Incidents

**Room: Redbird B ■ About 1.5 CPE ■ Personal Development – Non-Technical; Personnel/Human Resources – Non-Technical**

Recent national tragedies remind us that the risk is real; an active shooter incident can happen in any place at any



time. Mass shootings start and end very quickly; first responders often cannot get to a scene in time. Sixty-three percent of active shooter events are concluded by the 15-minute mark, either by police action or by suspect suicide. The best way to make sure you and your colleagues or loved ones stay safe is to prepare ahead of time and be ready. Taking a few steps now and mentally rehearsing what to do can help you react quickly when every second counts.

**Speakers:** **Sergeant Steve Formenti**, SWAT Team and Training Unit Supervisor, Will County Sheriff's Department, **Deputy Jeff Jerz**, SWAT Team Crisis/Hostage Negotiator and Training Unit Instructor, Will County Sheriff's Department  
**Moderator:** Anthony Fashoda, Assistant Director of Finance, Village of Hoffman Estates

## CONCURRENT SESSIONS MONDAY 4:25 PM – 5:15 PM

Monday 4:25 – 5:15 PM

### Illinois Department of Revenue – The Local Tax Allocation Division and Your Local Government

**Room:** Redbird A ■ **About 1.0 CPE** ■ **Finance – Technical**

The Illinois Department of Revenue (IDOR) will provide a demonstration and discussion of MyLocalTax, the new online portal for local governments. The IDOR will also provide updates on revenues and any legislative impacts for local governments.

**Speaker:** **Aaron Allen**, Division Manager, Local Tax Allocation Division, Illinois Department of Revenue  
**Moderator:** Scott Shamborg, MPA, Vice President of Customer Success, Azavar Government Solutions

Monday 4:25 – 5:15 PM

### Who Wants to Be a Pension Expert?

**Room:** Normal Theater ■ **About 1.0 CPE** ■ **Finance – Technical**

This session will be an interactive Q & A session inviting attendees to test their knowledge of Illinois downstate pension topics, such as QILDRO's, Tier 2 pensioners, Records Retention, Open Meetings Act, and Department of Insurance filings.

**Speakers:** **Allison Barrett**, Director, Lauterbach & Amen, LLP, **A.J. Weber**, Principal, Lauterbach & Amen, LLP, **Allie Rysell**, Professional Services Administrator, Lauterbach & Amen, LLP  
**Moderator:** Mary L. Tomanek, Senior Vice President & Institutional Consultant, Graystone Consulting

Monday 4:25 – 5:15 PM

## Five Tools to Help Local Governments Bridge and Strategic Planning and Execution Gap

**Room: Redbird B ■ About 1.0 CPE ■ Business Mgt & Organization – Non-Technical**

Leadership from local governmental units will come together on a periodic basis to develop a strategic plan, then armed with good intentions, ask program units, functional teams and project managers to work together to execute the initiatives the leadership team has chosen. Unfortunately, all too often, a gap in understanding and performance occurs for those charged with implementing the initiatives flowing from the strategy. This gap invariably translates into unwanted costs, lost opportunities and ultimately failure to execute. When a failure at execution occurs, the lost value resulting is highly significant. This “quickie” overview program will provide direction for productive strategic planning and execution. More specifically:

- Is there a disconnect between your organization’s strategy and target customers? (Tool 1: Strategy Canvas)
- Do you lack resources and try to do too much? (Tool 2: Cut Before You Add)
- Do you have too many good ideas and don’t know how to filter them? (Tool 3: 2x2 Prioritization Matrix)
- Are your leaders and middle managers leading implementation? (Tool 4: Objectives and Key Results – OKRs)
- Does your team lack necessary strategic planning and management competencies? (Tool 5: Strategic Management Competency Assessment)

**Speakers:** **Randall Rollinson**, Past President, ASP Chicago Chapter, President of LBL Strategies, **Joe Coberly**, ASP Atlanta Chapter, Senior Technology Strategist, Georgia Technology Authority

**Moderator:** Andrea Lamberg, CPA, Finance Director, City of Park Ridge

# TUESDAY AT A GLANCE

## Conference Registration

7:30 AM – 11:00 AM

## Speaker Ready Room

7:30 AM – 11:30 AM, North Meeting Room

## Buffet Breakfast

8:00 AM, Redbird CD

## Illinois Municipal League 2019 Legislative Update

8:30 AM – 9:45 AM, Redbird CD

**Concurrent Sessions** 10:00 AM – 11:15 AM

**Concurrent Sessions** 11:25 AM – 12:15 PM

## Breakfast

Breakfast on Tuesday is open to all attendees and exhibitors. A name badge is necessary for admittance to all meals.

*Beverages will be available in the pre-function area outside of Redbird Ballroom.*

*Unless noted otherwise all events are held at the Bloomington/Normal Marriott Hotel and Conference Center. IGFOA reserves the right to modify the agenda and/or speakers.*

TUESDAY

# TUESDAY SEPTEMBER 10

Tuesday 8:30 AM – 9:45 AM

## Illinois Municipal League 2019 Legislative Update

**Room: Redbird CD ■ About 1.5 CPE ■ Finance – Technical**

The Illinois Municipal League will provide an update on State legislative matters relevant to Illinois local governments.

**Speaker: Brad Cole**, Executive Director, Illinois Municipal League (IML)

**Moderators:** Bill McCarty, Director, Office of Budget and Management, City of Springfield, Chair – IGFOA Legislative Committee, Jason Ashmore, Mayor, City of Sesser, IL, IGFOA Legislative Committee, Shelly Hranka, Auditor, Tazewell County, IL, IGFOA Legislative Committee

### CONCURRENT SESSIONS TUESDAY 10:00 AM – 11:15 AM

Tuesday 10:00 AM – 11:15 AM

## GATA – An Overview of Indirect Cost

**Room: Redbird EF ■ About 1.5 CPE ■ Accounting (Governmental) – Technical**

Review key concepts for completing the GATA indirect cost process: gathering relevant data, determining the most applicable indirect cost rate under the new election system, and walking through the process to negotiate an indirect cost rate.

**Speakers: Carol A. Kraus**, CPA, Director of the Grant Accountability and Transparency Unit, Governor's Office of Management and Budget (GOMB), **Lori Beeler**, CPA, Manager of the Grant Accountability and Transparency Unit, Governor's Office of Management and Budget (GOMB)  
**Moderator:** Lynn McCammon, Finance Director, Village of Winfield

Tuesday 10:00 AM – 11:15 AM

## Leading By Example – Success Stories of Innovation, Growth and Engagement, and Ethical Fortitude

**Room: Redbird B ■ About 1.5 CPE ■ Personal Development – Non-Technical; Business Management & Organization – Non-Technical**

This session will highlight best practices and success stories from several leaders in government finance. Leading by example, these finance professionals will offer insight, strategies and thoughts on driving excellence in their organizations. Participants will hear stories of how innovation, employee growth and engagement, and ethical fortitude can be applied to significant challenges.

**Speakers:** **Tricia Dubiel**, Superintendent of Business and Finance, Bolingbrook Park District, **Nikki Larson**, Finance Director, Village of Glencoe, **Katie Ludwig**, Senior Manager, Government Finance Officers Association (GFOA), **Bill McCarty**, Director, Office of Budget and Management, City of Springfield

**Moderator:** Kevin Wachtel, Finance Director, Village of Villa Park

### CONCURRENT SESSIONS TUESDAY 11:25 AM – 12:15 PM

Tuesday 11:25 AM – 12:15 PM

## Safely Utilizing Credit in a Public Portfolio

**Room: Redbird A ■ About 1.0 CPE ■ Finance – Technical**

Managing credit with limited resources and without full-time credit experts can be a daunting task for investment managers at public entities. However, the availability of credit information has turned this from an impossible task (outside of simply following credit ratings) to something very accomplishable with a modest amount of credit knowledge and the help of models for evaluation. Participants will walk through a program that can help investors tackle these ongoing portfolio needs to place safety at the center of the portfolio while limiting the necessary sacrifice of income.

**Speaker:** **Justin H. Hoogendoorn**, CFA, Managing Director, Head of Fixed Income Strategy and Analytics, Piper Jaffray

**Moderator:** Sofia Anastopoulos, CFA, Executive Director, Illinois Metropolitan Investment Fund (IMET)

Tuesday 11:25 AM – 12:15 PM

## Demystify Finances for Your Elected Officials

**Room: Redbird EF ■ About 1.0 CPE ■ Finance – Technical**

Elected officials serve a very important role in the oversight of an organization, but many do not have the financial background to know what questions to ask and when to pay attention. Equip them with the knowledge needed to cut the clutter and focus on the most important financial matters.

**Speakers:** **Christina Coyle**, CPA, Finance Director, Village of Glen Ellyn, **Melissa Gallagher**, Finance Director, City of Rolling Meadows, **Timothy J. Gavin**, MBA, CPA, Lauterbach & Amen, LLP

**Moderator:** Julie Ciesla, MBA, CPFO, Assistant Chief Financial Officer, Peoria County

Tuesday 11:25 AM – 12:15 PM

## The Importance of Fleet Management

**Room Redbird B ■ About 1.5 CPE ■ Business Management & Organization – Non-Technical**

Outsourcing vehicles can offer organizations many advantages, including better cash flow, fewer administrative headaches, and a better public image. This session provides the opportunity to determine when it makes sense to outsource fleet management vs. managing it internally.

**Speakers:** **Jason Tyra**, Vice President, Enterprise Fleet Management, **Jason Szabo**, Finance Director, Enterprise Fleet Management

**Moderator:** Michael Wolf, Finance Director, Village of Bourbonnais

## VENDOR SHOWCASE

## Exhibit Hours

## Sunday, September 8

**5:00 PM – 6:30 PM**

## Monday, September 9

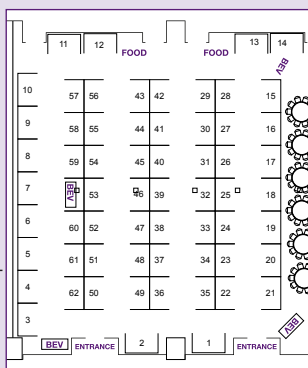
**9:30 AM – 12:30 PM**

**1:30 PM – 6:15 PM**

The Vendor Showcase is located in Redbird CD of the Bloomington-Normal Marriott Hotel and Conference Center.

This is an excellent opportunity to meet exhibitors offering services of interest to your government all in one location.

Take advantage of this dedicated time to learn more about the exhibiting companies. Play IGFOA Booth Bingo to earn raffle tickets to enter drawings for exceptional prizes!



## Vendor Showcase Game – IGFOA Booth Bingo!

Every public sector attendee will receive a Bingo game card in their Registration Packet. The game cards are double-sided.

**Collect stickers:** Visit exhibitor booths and collect a sticker from that booth and place it on the corresponding square on the Bingo game card.

**Complete rows for Bingo:** Complete rows with stickers (vertically, horizontally, diagonally) for a Bingo.

**Redeem for raffle tickets:** Redeem each Bingo for three (3) raffle tickets at any Partners' Forum member booth (3, 7, 13, 16, 23, 28, 53) or a Roving Bingo Ticketer. Bonus tickets will be awarded for a completely filled Bingo card (both sides). *Game participants must redeem all Bingos for tickets by 3:00 PM on Monday September 9, which is the end of the afternoon break.*

**Drop tickets in raffle boxes** – Look for the raffle boxes throughout the aisles of the Vendor Showcase. Each raffle box will show information about the particular prize. Drop your tickets into the raffle box (boxes) of your choice. *All tickets must be in raffle boxes by Monday September 9, at 5:45 PM.* Note: Raffle tickets are two part. Be sure to write your name on the ticket for the raffle box and keep the other half to claim your prize.

**Be present at the drawings to win** – The drawings for raffle prizes will be at 6:00 PM on Monday, September 9 at the end of the Vendor Showcase Closing. Winners **MUST** be present at the time of the drawing to claim their prize.

**FINE PRINT** – The game is only for those attendees registered under the Public Sector Member category. There is a limit of one prize per game participant. Game cards not meeting the game requirements for a Bingo are ineligible for raffle tickets.

# VENDOR SHOWCASE

VENDOR	BOOTH
Amalgamated Bank of Chicago	19
Arthur J. Gallagher & Co.	13
Asset Control Solutions, Inc.	46
AXA Advisors	1
Azavar Government Solutions	21
Baecore Group	31
BAIRD Public Finance	2
Baker Tilly Virchow Krause, LLP	4
Bernardi Securities, Inc.	32
BKD LLP	26
BMO Harris Bank N.A.	49
BS&A Software	61
Call One, Inc.	17
Capital Gains Incorporated	10
CBIZ Valuation Group, LLC	14
Chapman and Cutler LLP	20
Civic Systems LLC	58
ClientFirst Technology Consulting	18
CliftonLarsonAllen LLP	47
Crowe LLP	38
Enterprise Fleet Management	45
Federal Home Loan Bank of Chicago	15
Fifth Third Bank	35
First Bank Chicago, <i>a division of First Bank of Highland Park</i>	37
First Midwest Bank	6
Forecast5 Analytics, Inc.	48
Foster & Foster	51
GovHR USA	29
GW & Associates, PC	44
Huntington Bank	40
Ice Miller LLP	34



# VENDOR SHOWCASE

VENDOR	BOOTH
Illinois Metropolitan Investment Fund (IMET)	62
Illinois Public Risk Fund	11
InfoSend	30
Invoice Cloud	52
J.P. Morgan	12
Johnson & Bell, Ltd.	16
Katten Muchin Rosenman LLP	25
Lauterbach & Amen, LLP	33
Miller Cooper & Co., Ltd	43
Moody's Investors Service	59
MWM Consulting Group	36
PFM	3
Piper Jaffray & Co.	27
Plante Moran	5
PMA Financial Network, Inc.	28
Promontory Interfinancial Network, LLC	23
Raymond James	8
RSM US LLP	53
S&P Global Ratings	39
Sikich LLP	50
Sonnenschein Financial Services, Inc	24
Speer Financial, Inc.	41
Stifel	42
The Horton Group	9
Third Millennium Associates, Inc.	60
Tyler Technologies, Inc.	54
Tyler Technologies, Inc.	55
Waterworth	57
Wells Fargo Bank, NA	56
Wintrust Government Funds	22
Zions Bank	7

# EXECUTIVE BOARD

## Executive Board – 2018-2019

### **President:**

Melissa Gallagher  
Finance Director, City of Rolling Meadows

### **Vice President:**

Bill Hannah  
Finance Director, Village of North Aurora

### **Secretary:**

Kevin Wachtel  
Finance Director, Village of Villa Park

### **Treasurer:**

William McCarty II  
Director – Office of Budget and Management,  
City of Springfield

### **Immediate Past President:**

Christopher Minick  
Finance Director, City of St. Charles

### **Member-at-Large:**

John Harrington  
Finance Director, Village of Minooka

### **Member-at-Large:**

Tricia Dubiel  
Superintendent of Business & Finance,  
Bolingbrook Park District

### **Member-at-Large, Non-CFO:**

Andrew Brown  
Deputy Director of Finance, Village of Buffalo Grove

### **Partner Representative:**

Sue Kling  
Regional Director, Promontory Interfinancial Network LLC

### **GFOA State Representative :**

Rita Kruse  
Finance Manager, City of Geneva

### **Chicago Metro Chapter Representative:**

Anthony Fashoda  
Assistant Director of Finance, Village of Hoffman Estates

### **Downstate Chapter Representative:**

Molly Talkington

### **South Metro Chapter Representative:**

Lisa Heglund  
Finance Director, Village of Lockport

# COMMITTEE CHAIRS

## Committee Chairs – 2018-2019

### **Legislative Committee Chair:**

William McCarty II  
Director, Office of Budget and Management,  
City of Springfield

### **Membership Committee Chair:**

Linda Dalton  
Accounting Manager, Village of Woodridge

### **Nominating Committee Chair:**

Chris Minick  
Finance Director, City of St. Charles

### **Partners' Forum Chair:**

Sue Kling  
Regional Director, Promontory Interfinancial Network LLC

### **Professional Education Committee Chair:**

Rachel Musiala  
Director of Finance, Village of Hoffman Estates

### **Technical Accounting Review Committee Chair:**

Christina Coyle  
Finance Director, Village of Glen Ellyn

### **Growth and Engagement Network (GEN):**

Andrew Brown – Chair  
Deputy Director of Finance, Village of Buffalo Grove  
Andrew Kim – Co-Chair  
Director, Public Finance, PMA Financial Network, LLC

*Interested in volunteering for a Committee or Chapter?  
Contact the Committee Chair or Chapter President.*

# IGFOA CHAPTERS

Membership in the Illinois GFOA includes affiliation with the chapter of your choice. However, IGFOA members are welcome to attend any Chapter event regardless of affiliation.

## CHICAGO METRO CHAPTER

The Chicago Metro Chapter has members from Chicago Cook County and the collar counties. The Chicago Metro Chapter hosts luncheon meetings and an annual holiday gathering.

### Chicago Metro Chapter Leadership 2019

Anthony Fashoda, President; *Village of Hoffman Estates, Assistant Finance Director*

Rob Fredrickson, Immediate Past President; *United City of Yorkville, Finance Director*

Amit Thakkar, Vice President; *Village of Mount Prospect, Director of Finance*

Dell Duckworth, Treasurer; *Village of Winnetka, Accounting Manager*

Kyle Cratty, Secretary; *Park District of Oak Park, Director of Finance*

Aileen Haslett, Member-at-large; *City of Oakbrook Terrace, Financial Analyst*

## DOWNSTATE ILLINOIS CHAPTER

The Downstate Chapter represents IGFOA members outside of the Chicago metropolitan area and reflects the diversity of Illinois from Galena to Carbondale and Quincy to Danville. The Downstate Chapter hosts regional luncheon programs, seminars, and conferences.

### Downstate Illinois Chapter Leadership 2019

Molly Talkington, President

Gloria Osborn, Past President and Regional Coordinator; *City of Galesburg, Director of Finance & IT*

Sandy Evans, Vice President and Regional Coordinator; *City of O'Fallon, Director of Finance*

Tracy Kennett, Treasurer and Regional Coordinator; *City of Wood River, Finance Director*

Julie Ciesla, Secretary; *Peoria County, Assistant Chief Financial Officer*

Curtis Newport, Member-at-Large and Regional Coordinator; *Boone County, Treasurer*

Elizabeth Beaty, Regional Coordinator; *City of Urbana, Administrative Services Manager*

Keli Barrow, Regional Coordinator, *City of Salem, Finance Director*

Janette Dilliner, Regional Coordinator; *City of Sesser, City Treasurer*

Courtney R Kouzmanoff, Regional Coordinator; *City of Champaign*

Barbara Ramsay, Regional Coordinator; *Champaign County, Chief Deputy Auditor/Accounting Manager*

Carla Paschal, Regional Coordinator; *IASBO, Chief Financial Officer*

Will R Tolmie, Regional Coordinator; *City of Moline, Accounts Receivable Technician*

## **SOUTH METRO CHAPTER**

The South Metro Chapter represents members from Lyons to Joliet to Sauk Village. This Chapter holds quarterly luncheon programs and seminars. The South Metro Chapter also hosts an annual holiday gathering.

### **South Metro Chapter Leadership 2019**

Michael Wolf, President; *Village of Bourbonnais, Finance Director*

Lisa Heglund, Immediate Past President; *City of Lockport, Finance Director*

Christina N. Fisher, Vice President; *City of Markham, Finance Director*

David L. Sevier, Treasurer; *Village of Richton Park, Finance Director*

Anne Burkholder, Secretary, *Village of Shorewood, Finance Director*

Betty Zigras, Member-at-Large, *Village of Olympia Fields, Finance Director*

Mark A. Pries, Chapter Legislative Chair; *Village of Park Forest, Finance Director/Deputy Village Manager*

John Harrington, Chapter Membership Chair; *Village of Minooka, Finance Director*

# PAST IGFOA PRESIDENTS

*in order of year elected*

Harris Stevens* 1958	Daniel Ryan 1989
Alvin J. Keller 1959	David Jepson 1990
Roy E. Anderson 1960	Doug Ellsworth 1991
Donald C. Duranso* 1961	Gregory Peters 1992
Jack W. Loftus* 1962	Hella Tomczak 1993
William J. Tacey, Jr. 1963	Beth Couter 1994
James H. Bolerjack, Jr. 1964	Leonard Flood 1995
Ruby Geary* 1965	Richard Schnuer 1996
G. Edward Harris* 1966	Stan Helgerson 1997
Don L. Viane 1967	Spiro Hountalas 1998
Dean A. Porter 1968	David Cook 1999
Betty Schmidt 1969	Gary Szott 2000
M.O. Elliott 1970	Mary Dankowski 2001
Gerald Morrow 1971	Jeff Rowitz 2002
Calvin Henry* 1972	Brian Barnes 2003
Duane Blietz* 1973	Brian Caputo 2004
Kenneth A. Klein 1974	Kathryn Booth 2005
Darlene Heroz 1975	Robert Fialkowski 2006
Peg Grell 1976	Mark Nannini 2007
Sylvia Gross 1977	Dallas Whitford 2008
James J. Kelly* 1978	Rita A. Trainor 2009
Glendon M. Kiger* 1979	Tom Kuehne 2010
Kenneth M. Bonder* 1980	Sue Stanish 2011
Richard L. Jesse* 1981	Kim Auchstetter 2012
Joseph J. DeMichiel 1982	Scott Bordui 2013
George Coney 1983	Scott Anderson 2014
Edward F. Hosek* 1984	Rita Kruse 2015
Keith Wendland* 1985	Stephanie Masson 2016
Dennis Lauer* 1986	Christopher Minick 2017
Ronald J. Hill 1987	
George Valentine 1988	*Deceased

# Nomination Committee Report

The election of Executive Board Officers and Members-at-Large will be conducted during the Annual Business Meeting at the IGFOA Annual Conference on September 9, 2019 at the Bloomington-Normal Marriott Hotel and Conference Center.

## IGFOA Nominating Committee Recommended Slate 2019-2020

Position	Recommended Candidate
President	William Hannah, Finance Director, Village of North Aurora
Past President	Melissa Gallagher, Finance Director, City of Rolling Meadows
Vice President	Kevin Wachtel, Finance Director, Village of Villa Park
Treasurer	William McCarty, Director of Budget and Management, City of Springfield
Secretary	John Harrington, Finance Director, Village of Minooka
Member-at-Large	Tricia Dubiel, Superintendent of Business & Finance, Bolingbrook Park District
Member-at-Large	Elizabeth A. Holleb, Finance Director, City of Lake Forest
Member-at-Large, Non-CFO	Jennifer S. Johnson, Administrative Services Supervisor, City of Champaign

## Notes about the IGFOA Executive Board Additional Board positions not up for election at 2019 Annual Business Meeting

GFOA State Representative	Rita Kruse, Finance Manager, City of Geneva	Designated by IGFOA President
Partner Representative	Sue Kling, Promontory Interfinancial Network, LLC	Designated by IGFOA President
Downstate Chapter Representative	Molly Talkington	Direct Election by Downstate Chapter
South Metro Chapter Representative	Lisa Heglund, Finance Director, City of Lockport	Direct Election by South Metro Chapter
Chicago Metro Chapter Representative	Anthony Fashoda, Assistant Finance Director, Village of Hoffman Estates	Direct Election by Chicago Metro Chapter

# 2020 CONFERENCE



**Join IGFOA Next Year  
For the 2020 Annual Conference  
September 20 – 22  
President Abraham Lincoln Springfield  
Doubletree and  
Bank of Springfield Center  
Springfield, Illinois**

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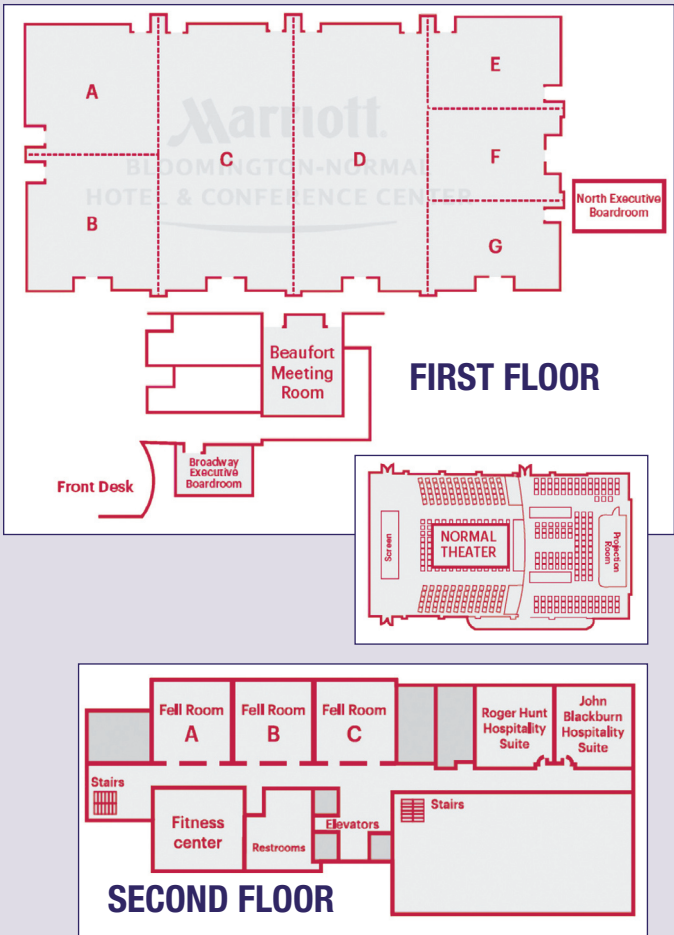
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Visit <http://www.igfoa.org>



# LOCATION GUIDE

## Bloomington/Normal Marriott Hotel & Conference Center 201 Broadway Street Normal, IL 61761



Complimentary Conference Attendee WIFI

Network: Marriott Conference  
Password/code: IGFOA2019

NAMETAGS ARE REQUIRED FOR ADMITTANCE TO ALL  
CONFERENCE SESSIONS, MEALS, AND ACTIVITIES.

# CONFERENCE AT-A-GLANCE

## SUNDAY – SEPTEMBER 8, 2019

10:00 AM – 6:30 PM	<b>Conference Registration</b> – Hotel & Conference Center Registration Desk
10:00 AM – 4:30 PM	<b>Speaker Ready Room</b> – North Street Meeting Room
11:00 AM – 12:15 PM	Statutory Requirements & Ethical Considerations for Public Officials – Redbird EFG
NOON – 1:00 PM	<b>Informal Lunch and Networking</b> – Fell A, Second Floor
1:00 – 3:15 PM	<b>Football Tailgate</b> – Fell B, Second Floor
1:00 – 1:50 PM	<b>Concurrent Sessions:</b>
	Borrowing with Bonds: New SEC Rules & Related Practical Considerations – Redbird A
2:00 – 2:50 PM	<b>Concurrent Sessions:</b>
	Understanding the New Changes to the Minimum Wage Law and Other Wage-Related Statutes – Redbird A
3:00 – 3:50 PM	<b>General Session: Financial Leadership</b> – Excellence Can Only Be Achieved By You!
4:00 – 5:00 PM	<b>President's Reception for New Members &amp; First Time Attendees</b> –
4:00 – 4:45 PM	<b>Sustaining &amp; Associate Partners' &amp; Exhibitors' Happy Hour</b>
5:00 – 6:30 PM	<b>Vendor Showcase Welcome Reception</b> – Redbird CD
6:30 – 9:00 PM	<b>Networking Dinner</b> on your own or <b>Optional Dinner alternative:</b>

## MONDAY – SEPTEMBER 9, 2019

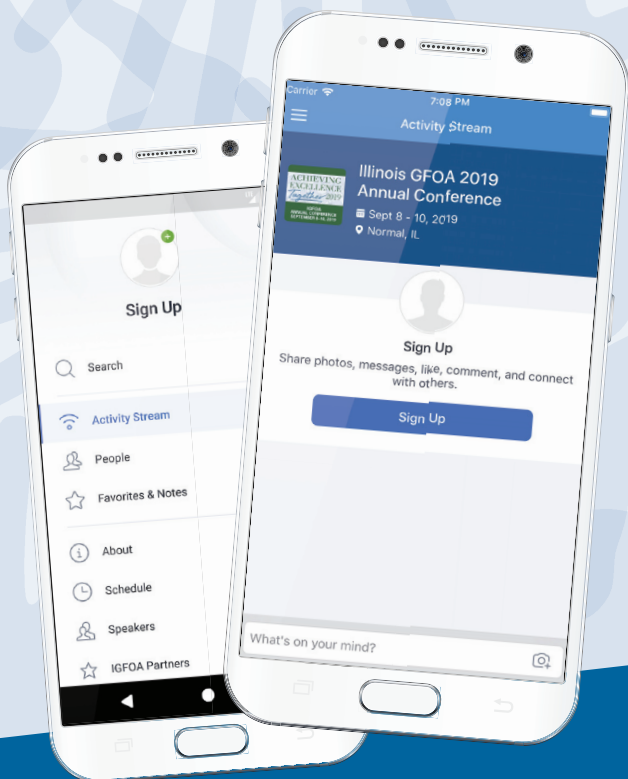
8:00 AM – 4:00 PM	<b>Conference Registration</b> – Hotel & Conference Center Registration Desk
8:00 AM – 4:00 PM	<b>Speaker Ready Room</b> – North Street Meeting Room
7:45 – 8:30 AM	<b>Breakfast Buffet</b> – Redbird EFG
8:00 – 8:30 AM	<b>Welcome and GFOA Update</b> – GFOA President-Elect, Marion M. Gee – Redbird EFG
8:30 – 9:20 AM	<b>Keynote Speaker: Jason Kuhn</b> – The Fundamentals of Winning – “For Each Other”
9:30 AM – 12:30 PM	<b>Vendor Showcase Open</b> – Redbird CD
9:30 – 10:20 AM	<b>Concurrent Sessions:</b>
	New Developments & Credit Trends in the IL Municipal Bond Market – Redbird A
10:40 – 11:30 AM	<b>Concurrent Sessions:</b>
	The Basics of Bonds for Park Districts & Non-Home Rule Communities – Redbird A
11:40 AM – 12:20 PM ROUNDTABLES	GFOA's CPFO Certification Program – Fell B
	Park Districts: Current Issues You're Dealing With...or Should Be? – Fell A
	County Revenues & Cost Drivers – Fell C
12:30 – 1:30 PM	<b>Luncheon and Annual Business Meeting</b> – Redbird EFG
1:30 – 5:30 PM	<b>Complimentary Headshots</b> – Fell A
1:30 – 6:15 PM	<b>Vendor Showcase Open</b> – Redbird CD
1:45 – 2:35 PM	<b>Concurrent Sessions:</b>
	Factors Impacting Rate Environment – Implications for IL Public Funds Investors – Redbird A
2:35 – 3:00 PM	<b>Dessert</b> in the Vendor Showcase – Redbird CD
3:00 – 4:15 PM	<b>Concurrent Sessions:</b>
	GASB Update – Part 2 – Normal Theater
4:25 – 5:15 PM	<b>Concurrent Sessions:</b>
	IDOR – The Local Tax Allocation Division & Your Local Government – Redbird A
5:15 – 6:15 PM	<b>Vendor Showcase Closing Reception</b> – Redbird CD
6:45 – 10:00 PM	<b>Social Event at the Destihl Brewery</b> , 1200 Greenbriar Dr., Normal, IL 61761

## TUESDAY – SEPTEMBER 10, 2019

7:30 – 11:00 AM	<b>Conference Registration</b> – Hotel and Conference Center Registration Desk
7:30 – 11:00 AM	<b>Speaker Ready Room</b> – North Street Meeting Room
8:00 AM	<b>Breakfast Buffet</b> – Redbird CD
8:30 – 9:45 AM	<b>Illinois Municipal League 2019 Legislative Update</b> – Redbird CD
10:00 – 11:15 AM	<b>Concurrent Sessions:</b>
	GATA – An Overview of Indirect Cost – Redbird EF
11:25 AM – 12:15 PM	<b>Concurrent Sessions:</b>
	Safely Utilizing Credit in a Public Portfolio – Redbird A

Unless noted otherwise all events are held at the Bloomington/Normal Marriott Hotel & Conference Center				KEYNOTE PRESENTATIONS	
				TRADITIONAL FINANCE SESSIONS	
				ACCOUNTING & FINANCIAL REPORTING	
				ALTERNATE SESSIONS	
				ROUNDTABLES	
				OTHER EVENTS	
				REGISTRATION AND MORE	
	Using Ratios & Other Indicators to Assess Fiscal Well Being – Normal Theater		Shared Services for Technology: Opportunities & Challenges to Maximizing Taxpayer Value – Redbird B		
	Investment Accounting & Reporting Meets Strategy – Normal Theater		Defending Your Organization Against Cyber Thugs – Redbird B		
– Redbird EFG					
Jesse Fell A, Second Floor					
(Public Sector Members welcomed) – Redbird CD					
Redbird FG					
– Redbird EFG					
	Fraud, Fraud Everywhere: Stories from the Fraud Frontline! – Normal Theater		It's Not Just Math: How Water Rates Drive Policy and Shape Your Community's Future – Redbird B		
	Accounting for TIFs – Normal Theater		Blockchain: Preparing for Disruption – Redbird B		
	Utility Billing Challenges for Finance Directors – Redbird B	Millennials in Public Finance – Beaufort Room	Mental Toughness, Leadership, & Team First with Jason Kuhn – Redbird A		
	GASB Update – Part 1 – Normal Theater		On-Line Payments – Self-Reported Taxes – Redbird B		
	Planning and Responding to Active Shooter/ Violent Incident – Redbird B				
	Who Wants to be a Pension Expert? – Normal Theater		Five Tools to Help Local Government Bridge the Strategic Planning and Execution Gap – Redbird B		
	Leading by Example – Success Stories of Innovation, Growth and Engagement, and Ethical Fortitude – Redbird B				
	Demystify Finances for Your Elected Officials – Redbird EF		The Importance of Fleet Management – Redbird B		

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