

IGFOA CAREER DEVELOPMENT COMMITTEE



**Illinois
Government
Finance
Officers
Association**

Learning • Connecting • Progressing

CURRICULUM DEVELOPMENT PLAN 2009-2012

*Original approved by the Executive Board November 20, 2008
Updated November 2009*

Background

In 2005, the Illinois Government Finance Officers Association Executive Board approved a strategic plan including a goal to “*Develop and deliver training programs that meet the needs of both new and experienced local government finance professionals*”, accompanied by an objective for the Career Development Committee to “*Develop a curriculum of fundamental through advanced local government finance topics*”. In June of 2005 the Career Development Committee embarked on an ambitious plan to expand the number and scope of training seminars offered to members. Chaired by Sue Stanish, Finance Director for the Village of Willowbrook, the 2005-2008 IGFOA Curriculum Development Plan called for the Committee to be organized into eight teams:

- Governmental Accounting
- Budgeting
- Cash Management
- Debt Management
- Local Government Revenue
- Illinois Public Pensions
- Hot Topics and Administration
- Support staff

Volunteers were recruited as leaders for each team and a schedule prepared incorporating some existing seminars and seminars to be developed. Over the next 4 years, the Career Development Committee developed 23 new seminars, retooled 12 existing seminars and delivered 402 Continuing Professional Education credits to 2,161 attendees. Pam Figolah, Finance Director for the Village of Roselle took the helm of the committee in 2006. In addition the Committee recruited new seminar coordinators and instructors, offered three annual Instructors Skills Workshops, set and met annual performance targets, established a Career Development resource page on the IGFOA web site, and worked with the IGOA Conference Committee to deliver advanced level seminars within the conference.

The Committee extends its gratitude to the Team Leaders that helped pave the way for the expanded professional training program for IGFOA members: Kathryn Booth, retired Finance Director, Village of Bartlett, Bill Hannah, Finance Director, Village of North Aurora, Stan Helgerson, Finance Director, Village of Carol Stream, Mark Horton, Finance Director, City of Wheaton, Mary Johnson, Assistant Finance Director, Village of Streamwood, Fred Lantz, Partner/Director of Government Service, Sikich LLP, Brian LeFevre, Partner, Sikich LLP, Larry Maholland, Director of Governmental Strategic Planning and Performance Measures, Sikich LLP, Michelle Saddler, then Executive Director, IMET, Harry Sakai, retired Finance Director, Village of Hanover Park, Richard Schnuer, Finance Director, City of Champaign, Tim Sexton, Finance Director, Village of Lombard, and Gary Szott, Finance Director, Village of Bloomingdale.

Volunteers that served on the committee as Seminar Coordinators during the 2005-2008 Curriculum Development Plan included:

2005-2008 Seminar Coordinators

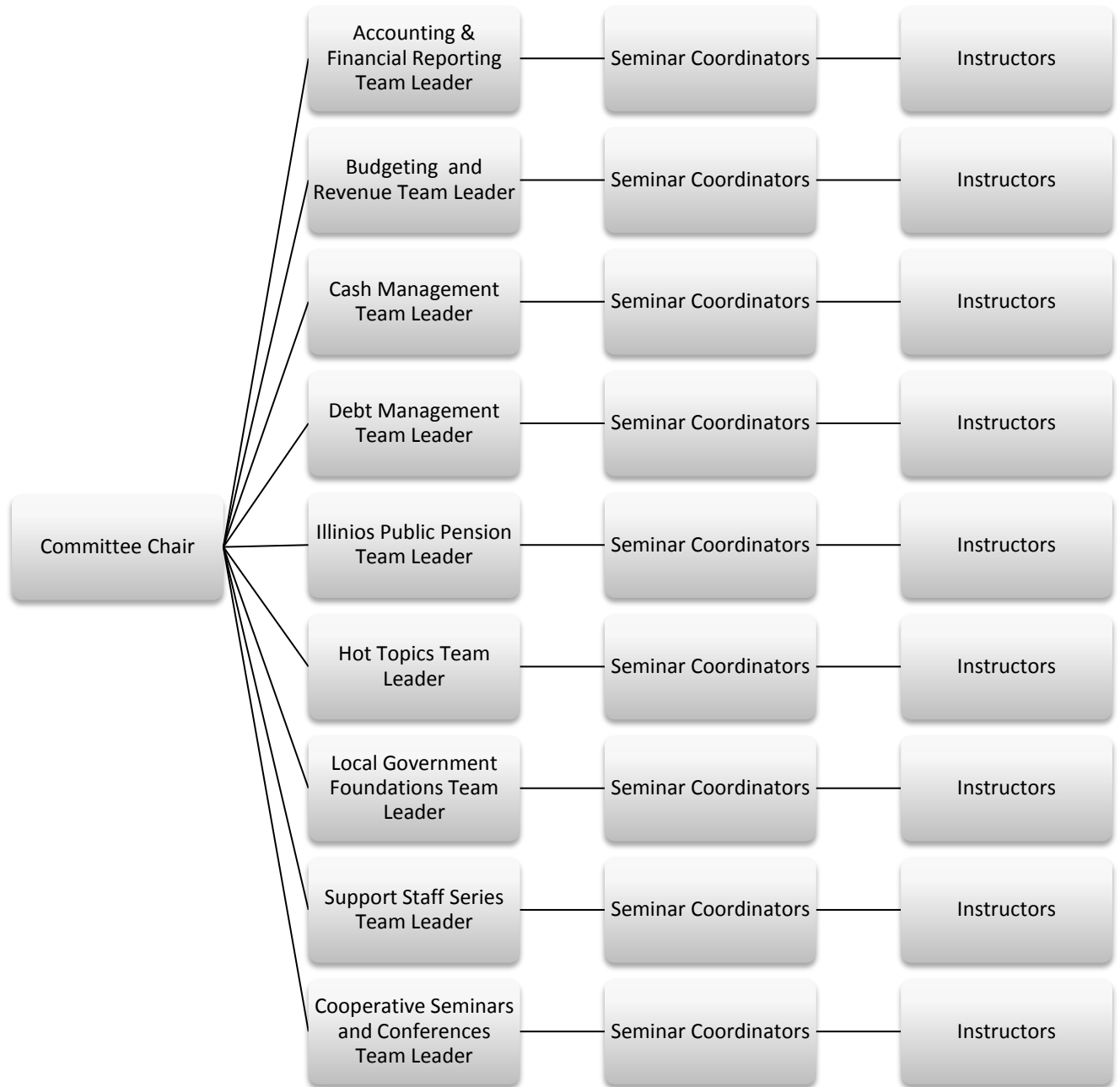
Kim Auchstetter, Village of New Lenox *	Larry Maholland, Sikich LLP
Kathryn Booth, Retired Village of Bartlett*	Ed McKee, Village of Winnetka*
Mary Dankowski, Village of Park Forest*	Kathy Reinertsen, City of Lake Forest
Barbara Fahnstrom, National City Bank*	Courtney Rios, PMA Financial Inc.*
Tom Gavin, Robert W. Baird & Co.	Jeff Rowitz, Village of Northbrook
Lynda Given, Chapman and Cutler	Harry Sakai, Retired Village of Hanover Park
Bill Hannah, Village of North Aurora	Karen Sanchez, Sikich LLP
Peg Hartnett, Village of Clarendon Hills*	Richard Schnuer, City of Champaign*
Stan Helgerson, Village of Carol Stream	Tim Sexton, Village of Lombard
Mark Horton, City of Wheaton*	Tina Smigielski, Village of Gurnee*
Mary Johnson, Village of Streamwood	Gary Szott, Village of Bloomingdale
Fred Lantz, Sikich LLP Group	Kevin Wachtel, Village of Riverside*
Brian LeFevre, Sikich LLP Group	

* *completed Instructors Skills Training*

Critical also to our ongoing success are the volunteer hours and energy numerous instructors shared with IGFOA. The Committee appreciates the support, suggestions, and participation of IGFOA members during the initial Curriculum Development Plan and looks forward to continued member involvement in the 2009-2012.

Career Development Committee Organization

For the 2009-2012 planning period, the Committee has added two new teams, Introductory Series and Cooperative Seminars and Conferences, to better distribute the workload amongst volunteer team leaders.



Volunteer Position Descriptions

Committee Chair: The Chair of the Career Development Committee is appointed by the IGFOA President and typically serves a three-year term. The Chair's responsibilities as outlined in the [Executive Board policy](#) include (refer to policies for additional information):

- Developing annual objectives and work plan for the committee,
- Advise the Executive Director of any particular needs for resources or services of the committee for inclusion in the annual budget,
- Work with Board Liaison to assure that the committee is responsive to the Board's policy direction and goals,
- Coordinate activities with the Executive Director to assure committee activities do not conflict, but rather complement, activities of other committees, chapters and the Board,
- Review and update roster of committee members to assure all members are active and committee has adequate volunteers to carry out the work plan,
- Recruit new committee members as needed,
- Plan, notice and conduct meetings of the committee as needed to meet the objectives of the committee,
- Work with Executive Director to plan and host at Instructors' Skills Workshops.
- Assign duties and responsibilities to all committee members and establish sub-committees as necessary to complete the committee's work, and
- Prepare a written progress report of committee activities and status of attaining objectives.

Curriculum Team Leaders: are appointed by the Career Development Committee Chair and typically serves a three-year term. Team Leaders meet with the Committee Chair and Executive Director up to six times each year, with most meetings held by teleconference and at least one planning meeting held in person. The Team Leader's responsibilities include:

- Participate in scheduled committee meetings to update the Curriculum Development Plan as needed, develop the annual schedule of training seminars, review seminar evaluation reports and discuss areas for improvement, recommend policies and practices to the Executive Board, and to share information and ideas to improve the IGFOA curriculum.
- Recruit Coordinators for each planned seminar and coach the Coordinator regarding their role and responsibilities. Team leaders may choose to also serve as Coordinator for seminar(s) as appropriate.
- Work with Coordinators and other volunteers as needed to develop new seminars, including agenda, attendees' material, and instructional curriculum guides.
- Review draft agendas for each seminar with Coordinator and advise Coordinator in the selection of seminar instructors.
- Encourage Coordinators and instructors to participate in Career Development Committee Instructor Skills workshops.
- Monitor Coordinators progress in meeting deadlines and providing information and materials as specified in seminar planning calendar. Alert Committee Chair and Executive Director of difficulties in planning and delivering seminars. Work with Coordinators to assure seminars delivered as planned.
- Work with Coordinators and recruit additional volunteers as necessary to periodically review seminar materials and update as needed.

Seminar Coordinators: are appointed by the respective Career Development Committee Team Leader. The Team may hold a planning meeting in person or via teleconference. The Seminar Coordinator typically recruits and coordinates Instructors via conference calls and e-mails. Refer to the Career Development Planning Calendar for specific deadlines. The Coordinator's responsibilities include:

- Participate in scheduled meetings of their assigned topic team to review the annual schedule of training seminars, assign responsibility for various seminars amongst the coordinators, review the seminar planning calendar and discuss how to meet target dates, review their team's seminar evaluation reports and discuss areas for improvement, and share information and ideas to improve the team's seminars.
- Draft agenda and potential instructor assignments for assigned seminar to review with Team Leader.
- Recruit instructors for assigned seminar and coach the instructors regarding their role and responsibilities.
- Monitor instructors' progress in meeting deadlines and providing information and materials as specified in seminar planning calendar. Alert Team Leader of difficulties in planning and delivering seminars. Work with instructors to assure seminars delivered as planned.
- Encourage instructors to participate in Career Development Committee Instructor Skills workshops.
- Work with Team Leader and recruit additional volunteers as necessary to periodically review seminar materials and update as needed.

Instructors: IGFOA Instructions and Guidelines for IGFOA Instructors to be developed.

Career Development Committee 2010 Priorities

- Except where IGFOA seminars are targeted to a specific type of jurisdiction (type of government, size, location, etc) include information and examples pertinent to a variety of Illinois local governments. Recruit instructors from special districts to expand the relevance of materials and instruction.
- Draw from membership, both primary public sector and associate vendor members, for seminar instructors. In recruiting instructors, first look to IGFOA members, unless the knowledge, experience, or teaching capabilities required are not available within the IGFOA membership. Work with IGFOA standing committees to tap into their expertise and provide a link between committee work and the membership. Use membership database to identify members volunteering to speak. Encourage instructors and prospective instructors to attend Career Development Instructors Skills workshops.
- Assure that seminars continue to begin and conclude on time and offer appropriate Continuing Professional Education hours.
- Plan new seminars and review existing seminars to incorporate teaching methods appropriate for adult learners, including opportunities for interactive instruction. Include time during each seminar for participants to exchange information and ideas.
- Explore opportunities to offer additional training to IGFOA members by partnering with other associations and groups, making sure that such partnerships are in the best interest of the Association and do not conflict with existing IGFOA programs.
- Strive to announce seminar details at least 3 months in advance to allow members sufficient time to plan and budget their attendance.
- Regularly review seminar evaluations and discuss approaches to improve seminars.
- Develop a standard IGFOA Instructors Guide.
- Draft policy and procedures to secure appropriate copyright or licensing for all instructional materials.
- Explore avenues to deliver seminars via live internet connection to remote sites.
- Support regional training programs of IGFOA Downstate Chapter

2009-2012 Curriculum Overview

Accounting & Financial Reporting	Budgeting and Revenue	Cash Management	Debt Management	Illinois Public Pensions	Support Staff	Hot Topics & Admin	Foundations and Cooperative
Basic Governmental Accounting	Basic Local Government Budgeting	Basic Public Funds Management	Basic Debt Management	Understanding Local government public pensions	Support Staff varying topics	Basic local government purchasing	Talking to non-finance staff and elected officials about government finance
Intermediate Governmental Accounting	Advanced Local Government Budgeting	Public Funds Management Institute	Debt Management Institute	Illinois Public Pension Institute	Utility Billing	Hot Topic	All About Local Government
Advanced Governmental Accounting	Capital Improvement Planning	Interim Financing Alternatives	Hot Topics in Debt Management		Payroll	Additional Hot Topics seminars as needed	IGFOA Conference Recap
Local Government Financial Reporting	Property Tax Institute	Local Government Investment Policies and Procedures					Joint Conference with Wisconsin GFOA
Accounting & Internal Control Policies	Basic local government revenue	Cash Flow Analysis					Joint seminar with IASBO
							Public Finance Law Institute with ILGL
							Introductory 101 seminars on demand

Accounting series

Team Leaders

Fred Lantz, Sikich LLP
 Brian LeFevre, Sikich LLP

Ongoing Schedule

Seminar	Frequency	Month	Duration
Basic Governmental Accounting	Annual	varies	up to 1 day
Intermediate Governmental Accounting	Biennial-even	March	2 days
Advanced Governmental Accounting	Biennial-odd	March	2 days
Illinois Local Government Financial Reporting Accounting and Internal Control Policies and Procedures	Annual	October	1 day
GASB 54 Fund Balance Implementation	Biennial-odd as needed	May/June February	1 day <u>½ day</u>

Notes:

- Include question in evaluation survey for Basic Governmental Accounting seminar attendees – do you plan to attend an Intermediate or Advanced Governmental Accounting seminar with IGFOA in the coming year?
- Consider developing a condensed ½ day version of Basic Governmental Accounting for live internet delivery
- Develop certificate of completion for attendees that complete entire series within 5 year period.

Budget Series to merge with Local Government Revenue team

Cash Management Series

Team Leader

Cynthia Evangelisti, Chicago Park District

<u>Seminars to be developed</u>	<u>Duration</u>	<u>Launch by</u>
Understanding Local Government Investment Policies and Procedures Seminar	½ day	January 2009
Cash Flow Analysis seminar	2 hour	October 2009
Basic Public Funds Management Seminar	1 day	October 2010
Hot topics in Public Funds Management	½ day	March 2010

Ongoing Schedule

Seminar	Frequency	Month	Duration
Interim Financing Alternatives	Biennial-even	February	½ day
Basic Public Funds Management	Annual	April	1day
Cash Flow Analysis	Annual	February	2 hours
Understanding Local Government Investment Policies and Procedures	Biennial-odd	February	½ day
Public Funds Management Institute	Biennial-odd	October	1 day
Hot topics in Public Funds Management	Annual	March	½ day

Debt Management Series

Team Leaders

Richard Schnuer, City of Champaign

Ongoing Schedule

Seminar	Frequency	Month	Duration
Basic Debt Management	Annual	March/May	2/3 day
Hot topics in Debt Management	Biennial-odd	October	½ day
Debt Management Institute	Biennial-even	October	1 day

Illinois Public Pension Series

Team Leader

Tim Sexton, Village of Lombard

Ongoing Schedule

Seminar	Frequency	Month	Duration
Understanding local government public pensions	Biennial	February	1 day
IPP Institute	Annual	April	1 day

Local Government Budget/Revenue Series

Team Leader

Jim Egeberg, Village of Westchester

Ongoing Schedule

Seminar	Frequency	Month	Duration
Basic local government revenue	Annual	July/August	1 day
Property Tax Institute	Biennial-odd	August	1 day
Basic Local Government Budgeting	Annual	June/July	1 day
Advanced Local Government Budgeting	Biennial odd	November	2 day
Capital Improvement Planning	Biennial even	November	1 day

Hot Topics/Administration

Team Leaders

Bill Hannah, Village of North Aurora

<u>Seminars to be developed</u>	<u>Duration</u>	<u>Launch by</u>
Basic local government purchasing	½ day	May 2010

Ongoing Schedule

Seminar	Frequency	Month	Duration
Basic local government purchasing	Biennial-odd	September	½ day
Hot Topics Conference	Annual	March	1 day
Additional Hot topic seminars as needed	Annual	varies	½ day

Support Staff Series

Team Leaders

Mary Johnson, Village of Streamwood
 Mark Horton, Village of Oswego

Ongoing Schedule*

Seminar	Frequency	Month	Duration
Utility Billing	Annual	June	2/3 day
Payroll	Annual	December	2/3 day
Support Staff Seminar – varying topics	Annual	March	2/3 day

Foundations Series

Team Leader

Dave Erb, Village of Mount Prospect

<u>Seminars to be developed</u>	<u>Duration</u>	<u>Launch by</u>
Talking to non-finance staff and elected officials about local government finance	½ day	August 2010
All about local government	½ day	June 2010

Ongoing Schedule

Seminar	Frequency	Month	Duration
Talking to non-finance staff and elected officials about local government finance	Annual	October	½ day
All about local government	Annual	September	½ day
Local government finance 101 Accounting and Financial Reporting Budgeting and CIP Financial management policies Revenue sources	On demand	varies	½ day – 1 day

Notes:

All About Local Government to cover basic structure, differences between resolution and ordinances, quirks that affect finance. Explore using existing university program.

Cooperative Seminars and Conferences

Team Leader

To be coordinated by Executive Director and Committee Chair

Seminars to be developed

Hot topics for overlapping local governments

Confirmed Partners

IASBO

Launch by

April 2010

Ongoing Schedule

Seminar/Conference

Frequency

Month

Duration

moved to Hot Topic team	Joint Conference with Wisconsin GFOA	Annual	May	1 and ½ days
Public Finance Law Institute with ILGL		Annual	December	1 day
Local Government Finance Ethics Workshop with IASBO		Annual	May	1 day
Hot topics for overlapping local governments		Annual	July*	1 day

Career Development Committee Resources

Committee Resource page – link to Committee planning calendar, targets, evaluation reports, and samples. <http://www.igfoa.org/CareerDevelopmentRD.html>

Current list of IGFOA seminars – seminars currently accepting registration.
<http://www.igfoa.org/seminars.html>

IGFOA seminar archives – agendas and announcements from prior seminars.
<http://www.igfoa.org/Seminararchive.html>

IGFOA planning calendar – see list of both confirmed and planned events.
<http://www.igfoa.org/Calendar/Login.aspx>. See separate email for userid and password.

IGFOA Members Volunteering to Speak – to search an up-to-date list of IGFOA members that have volunteered to speak at seminars and conferences, log-in at <http://www.igfoa.org/index.asp>, choose *Search*, from the top menu, then use the drop down list at *Use a Saved Search* to select *Volunteer Speakers*.

GFOA Recommended Practices:

http://www.gfoa.org/index.php?option=com_content&task=view&id=118&Itemid=130