

*IGFOA Professional Education Committee Utility Billing Team presents:*

## **Utility Billing Seminar**

**June 20, 2024**

NIU Naperville, 1120 E. Diehl Rd., Naperville, IL 60563

### **AGENDA**

**8:30 – 8:50 AM**                      **Check-in, Networking & Coffee**

**8:50 – 9:00 AM**                      **Welcome and Introductions**

**Reese Weigle**, *Plante Moran. PEC Utility Billing Team Leader*

**9:00 – 10:15 AM**                      **Elevating Customer Experience through Communication Mastery**

**Speaker: Maria de Lourdes Coss, MPA, NIGP-CPP, CPPO**, Owner,  
*M.L. Coss and Associates, LLC*

DISCover how to enhance your interpersonal skills to provide exceptional customer experiences. This dynamic session will explore effective communication based on the Maxwell DISC Model. By understanding and leveraging DISC personality tendencies, you will learn how to navigate various communication styles to foster positive interactions with customers and colleagues alike.

Throughout the session, learn practical strategies for tailoring your communication approach to different personality types encountered in day-to-day interactions. Attendees will gain valuable insights into how to adapt communication styles to build rapport and trust with diverse individuals.

**Learning Objectives:** *Participants completing this session will be able to:*

- Gain self-awareness of your communication style and how it influences interactions with others;
- Learn techniques for effectively communicating with colleagues and customers of varying personality types, leading to smoother interactions and increased customer satisfaction;
- Develop the ability to recognize and appreciate the unique strengths of team members, fostering a collaborative and supportive work environment; and
- Apply the principles of effective communication to provide personalized and empathetic service to customers, ultimately enhancing their experience and loyalty.

**CPE:** About 1.5 hours   **Field of Study:** Personal Development – Non-Technical   **Level:** Overview

**10:15 – 10:30 AM**                      **Break**

**10:30 – 11:20 AM**                      **Roundtable: Best Practices in Payment Collection**

**Facilitators: Susana Arroyo**, Chicago Metro Chapter President and Assistant Finance Director, *Village of Hoffman Estates*

**Daren Clary**, Assistant Director of Finance, *Village of Woodridge*

**Tricia Jensen**, Customer Service Supervisor, *Village of Hoffman Estates*

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

**11:20 AM – 12:10 PM    Cybersecurity: Control What You Can and Prepare For What You Can't**

**Speaker:** Allen Allos, Manager, Cybersecurity – Public Sector, *Plante Moran*

**Furney “Alex” Brown, CPA**, Principal, Cybersecurity – Public Sector, *Plante Moran*

In today's digital age, the landscape of cybersecurity is rapidly evolving, presenting new challenges and vulnerabilities at every turn. This presentation will equip participants with the knowledge and strategies needed to navigate the complex cybersecurity environment effectively and emphasize the importance of why organizations should implement robust security measures to control and prepare for unforeseen threats. This session will also highlight real-world examples and case studies to illustrate best practices and lessons learned from both successful cybersecurity initiatives and high-profile breaches.

**Learning Objectives:** *Participants completing this session will be able to:*

- Understand the current cybersecurity landscape;
- Learn about the essential proactive controls and practices that can be implemented to strengthen cybersecurity risks; and
- Discover the role of human factors in cybersecurity and the importance of training, awareness programs, and the continuous involvement of all employees in maintaining cybersecurity.

**CPE:** About 1.0 hours    **Field of Study:** Information Technology –Technical    **Level:** Overview

**12:10 – 1:00 PM            Networking Lunch**

**1:00 – 2:00 PM            Roundtable: First Amendment Audits, Fraud, and Ethical Decision Making**

**Facilitators:** Susana Arroyo, Chicago Metro Chapter President and Assistant Finance Director, *Village of Hoffman Estates*

**Daren Clary**, Assistant Director of Finance, *Village of Woodridge*

**Tricia Jensen**, Customer Service Supervisor, *Village of Hoffman Estates*

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

**2:00 – 3:15 PM            Understanding Utility Billing and Legal Compliance**

**Speaker:** Mallory Milluzzi, *Klein, Thorpe & Jenkins*

An attorney with extensive knowledge in local government utility billing legal affairs will address common legal concerns encountered by utility providers. Topics to be covered include bankruptcy, Red Flag Rules, tenant/landlord responsibilities, and collections.

**Learning Objectives:** *Participants completing this session will be able to:*

- Avoid legal pitfalls;
- Avoid getting in the middle of tenant/landlord disputes;
- Explore the legal opportunities available to improve collection efforts;
- Understand methods to improve policies, procedures, and ordinances as it relates to utility billing and collection;
- Understand responsibilities under the Red Flag Rules; and

- Learn about common legal issues encountered during the utility billing process, including bankruptcy, collection, tenant/landlord rights, liens and utility accountholder identity verification and protection.

**3:15 – 3:30 PM**

**Break**

**3:30 – 4:00 PM**

**Understanding Utility Billing and Legal Compliance - *Continued***

**Speaker: Mallory Milluzzi, Klein, Thorpe & Jenkins**

Mallory Milluzzi will draw upon her experience and expertise to answer your utility billing legal questions.

**CPE:** About 2.0 hours **Field of Study:** Business Law – Technical **Level:** Overview

**4:00 PM**

**Closing Remarks**

**Reese Weigle, Plante Moran. PEC Utility Billing Team Leader**