

# CONFERENCE SCHEDULE AND GUIDE



SEPTEMBER 11-13, 2016 • BLOOMINGTON/NORMAL

# SUSTAINING PARTNERS



Your organization  
could be here, too.  
Visit  
[www.igfoa.org/membership](http://www.igfoa.org/membership)  
for details.

RECOGNIZING THAT  
SUSTAINING AND ASSOCIATE MEMBERS  
ARE TRULY PARTNERS.

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

## IGFOA Sustaining Partner Firms

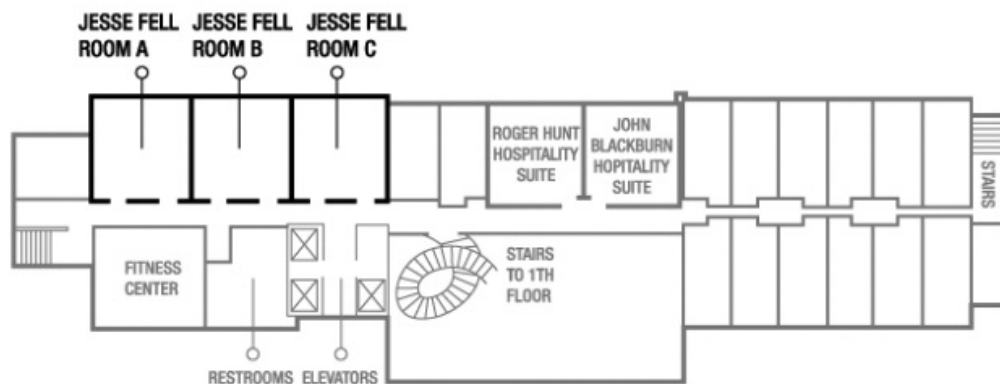
Arthur J. Gallagher & Co.	JPMorgan Chase
AXA Advisors	MB Financial Bank
Azavar Audit Solutions, Inc.	MWM Consulting Group
Baker Tilly Virchow Krause, LLP	PFM Group
BMO Harris Bank N.A.	PMA Financial Network, Inc.
Capital Gains Incorporated	Promontory Interfinancial Network, LLC
Chapman and Cutler LLP	Sawyer Falduto Asset Management, LLC
Federal Home Loan Bank of Chicago	Sikich LLP
Illinois Metropolitan Investment Fund	Wintrust Financial
IML–Risk Management Association	Zions Bank

## IGFOA Associate Partner Firms

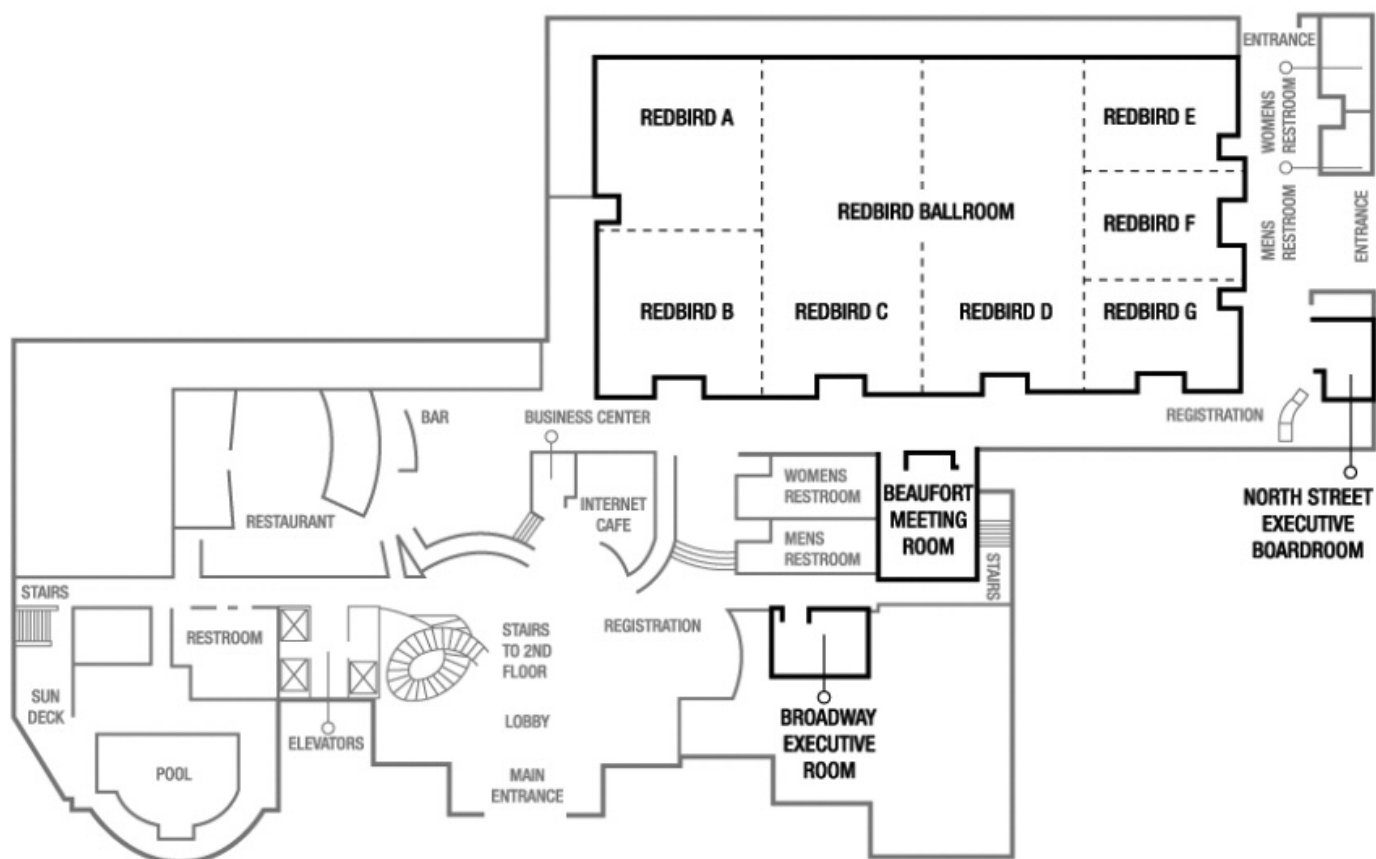
Amalgamated Bank of Chicago	KattenMuchinRosenman LLP
BKD LLP	Klein Hall CPAs
BS&A Software	Lauterbach & Amen, LLP
Civic Systems, Inc.	Miller Cooper & Co., Ltd
CliftonLarsonAllen LLP	Mitchell I. Serota & Associates Inc.
Commerce Bank	Mitchell, Vaught & Taylor, Inc.
Crowe Horwath LLP	Moody's Investors Service
Ehlers	OpenGov, Inc.
Fifth Third Securities, Inc.	Plante Moran
First Midwest Bank	Robert W. Baird & Co., Inc.
FirstMerit Bank	RSM US LLP
Forecast5 Analytics, Inc.	Sebis Direct Inc.
Foster & Foster	Siemens Industry, Inc.
GovHR USA	Speer Financial, Inc.
Graystone Consulting	S&P Global Ratings
GW & Associates, PC	Third Millennium Associates, Inc.
InfoSend	Tyler Technologies, Inc.

## Quick Guide to the Location of IGFOA Conference Sessions

### SECOND FLOOR



### FIRST FLOOR



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

## Schedule at a Glance

*refer to schedule on pages 4 through 5 for room assignments*

### Sunday, September 11, 2016

8:30 AM	Golf Outing
NOON–6:30 PM	Registration Desk Open
1:00–2:15 PM	Hot Topic: My Budget is Too Small for Big City Internal Controls: What Can I Do?
1:00–2:15 PM	Hot Topic: Understanding the Benefits of P-Cards and A/P Card Programs
1:00–2:15 PM	Advanced Hot Topic: Matching Investment Strategy with Portfolio Strategies
2:30–3:45 PM	Hot Topic: Never Miss a Due Date Again: An Annual Timeline for Local Government Reporting
2:30–3:45 PM	Hot Topic: Get the Check Out of Here – Electronic Payment and Receipt Alternatives
2:30–3:45 PM	Advanced Hot Topic: Turning Your Financial Data into Information
4:00–5:00 PM	President's New Member & First Time Attendee Reception
4:00–4:45 PM	Sustaining and Associate Partners and Individual Firms Meet and Greet
5:00–6:30 PM	Vendor Showcase Opens in the Ballroom – Mystery Dinner Theater: The Case of the Missing Green
7:00–10:00 PM	Assistants Network & Young Professionals Network Reception at Medici's (all are welcome)

### Monday, September 12, 2016

7:00 AM–4:00 PM	Registration Desk Open
8:00 AM–6:00 PM	Vendor Showcase
8:00–8:30 AM	Plated Breakfast
8:30–9:20 AM	Keynote Address: Governor Jim Edgar
9:30–10:30 AM	Hot Topic: Preparing a PAFR
9:30–10:30 AM	Advanced Hot Topic: GASB Update
11:00 AM–NOON	Hot Topic: Illinois Performance Excellence – The IMRF Story: How Your Unit of Government Can Start its Own Journey of Excellence
11:00 AM–NOON	Advanced Hot Topic: Capital Improvement Planning and Financing: The How, When, Who, and Why?
NOON–1:30 PM	Luncheon and Annual Business Meeting
1:45–2:45 PM	Hot Topic: Procurement Fraud
1:45–2:45 PM	Advanced Hot Topic: Tax Caps, The Property Freeze, and Related Considerations
3:15–4:45 PM	General Session: Small Thefts, Big Headaches: What to Look For and How to Move Forward
4:45–6:00 PM	Reception – Grand Closing of the Vendor Showcase – The Case of the Missing Green: The Big Reveal

*Between all sessions, breaks are available in the Vendor Showcase in the Ballroom – Redbird CDEFG*

### Tuesday, September 13, 2016

8:15 AM	Breakfast Buffet
8:30–9:45 AM	Legislative Update
10:00–11:00 AM	Hot Topic: The "Care and Feeding" of Newly Elected Officials
10:00–11:00 AM	Advanced Hot Topic: Getting Finance to the Table: Building a Complete Team for Collective Bargaining
11:15 AM–12:15 PM	Hot Topic: Utilizing Lean Thinking to Save Time and Money
11:15 AM–12:15 PM	Advanced Hot Topic: Doing Things Differently–Don't be Afraid

## 2016 Annual Conference Summary Schedule

Day	Start Time	End Time	Title	Location/ Meeting Room
Sunday	8:30 AM	NOON	Golf Outing	Prairie Vista Golf Course, 502 W Hamilton Rd, Bloomington
Sunday	NOON	7:00 PM	Registration Desk Open	Registration
Sunday	NOON	4:00 PM	Speaker Ready Room	North Meeting Room
Sunday	1:00 PM	2:15 PM	Hot Topic: My Budget is Too Small for Big City Internal Controls: What Can I Do?	Redbird B
Sunday	1:00 PM	2:15 PM	Hot Topic: Understanding the Benefits of P-Cards and A/P Card Programs	Redbird A
Sunday	1:00 PM	2:15 PM	Advanced Hot Topic: Matching Investment Strategy with Portfolio Strategies	Beaufort
Sunday	2:30 PM	3:45 PM	Hot Topic: Never Miss a Due Date Again: An Annual Timeline for Local Government Reporting	Beaufort
Sunday	2:30 PM	3:45 PM	Hot Topic: Get the Check Out of Here—Electronic Payment and Receipt Alternatives	Redbird A
Sunday	2:30 PM	3:45 PM	Advanced Hot Topic: Turning Your Financial Data into Information	Redbird B
Sunday	2:00 PM	4:00 PM	Exhibit Booth Setup – Vendor Showcase	Redbird CDEFG
Sunday	4:00 PM	5:00 PM	President's New Member and First Time Attendee Welcome Reception	Concierge Lounge – 9th Floor
Sunday	4:00 PM	4:45 PM	Sustaining and Associate Partners' Meet and Greet	Redbird CDEFG
Sunday	5:00 PM	6:30 PM	Vendor Showcase Opening & Mystery Dinner Theater: The Case of the Missing Green	Redbird CDEFG
Sunday	7:00 PM	10:00 PM	Assistants Network & Young Professionals Network Reception	Medici's, 120 North Street, Normal (all are welcome)
Monday	7:00 AM	4:00 PM	Registration Desk Open	Registration
Monday	7:00 AM	4:00 PM	Speaker Ready Room	North Meeting Room
Monday	8:00 AM	6:00 PM	Vendor Showcase	Redbird CDEFG
Monday	8:00 AM	8:30 AM	Plated Breakfast	Redbird CDEFG
Monday	8:30 AM	9:20 AM	Keynote Address: Governor Jim Edgar, Leadership in Challenging Times	Redbird CDEFG
Monday	9:30 AM	10:30 AM	Hot Topic: Preparing a PAFR	Normal Theater
Monday	9:30 AM	10:30 AM	Advanced Hot Topic: GASB Update	Redbird AB
Monday	10:30 AM	11:00 AM	Break	Redbird CDEFG

*Monday continued next page*

**2016 Annual Conference Summary Schedule, *continued***

Day	Start Time	End Time	Title	Location/ Meeting Room
Monday	11:00 AM	NOON	Hot Topic: Illinois Performance Excellence – the IMRF Story: How Your Unit of Government Can Start its Own Journey of Excellence	Normal Theater
Monday	11:00 AM	NOON	Advanced Hot Topic: Capital Improvement Planning and Financing: The How, When, Who, and Why?	Redbird AB
Monday	NOON	1:30 PM	Luncheon and Annual Business Meeting	Redbird CDEFG
Monday	1:45 PM	2:45 PM	Hot Topic: Procurement Fraud	Normal Theater
Monday	1:45 PM	2:45 PM	Advanced Hot Topic: Tax Caps, The Property Freeze, and Related Considerations	Redbird AB
Monday	2:45 PM	3:15 PM	Afternoon Break	Redbird CDEFG
Monday	3:15 PM	4:45 PM	General Session: Small Thefts, Big Headaches: What to Look For and How to Move Forward	Redbird CDEFG
Monday	4:45 PM	6:00 PM	Grand Closing of the Vendor Showcase – Reception – The Case of the Missing Green: The Big Reveal	Redbird CDEFG
Monday	6:00 PM	7:00 PM	Exhibit Booth Tear Down – Vendor Showcase	Redbird CDEFG
Tuesday	7:30 AM	11:00 AM	Speaker Ready Room	North Meeting Room
Tuesday	8:15 AM		Buffet Breakfast	Redbird CD
Tuesday	8:30 AM	9:45 AM	Legislative Update	Redbird CD
Tuesday	10:00 AM	11:00 AM	Hot Topic: The “Care and Feeding” of Newly Elected Officials	Redbird EFG
Tuesday	10:00 AM	11:00 AM	Advanced Hot Topic: Getting Finance the Table: Building a Complete Team for Collective Bargaining	Redbird AB
Tuesday	11:00 AM	12:15 PM	Hot Topic: Utilizing Lean Thinking to Save Time and Money	Redbird EFG
Tuesday	11:00 AM	12:15 PM	Advanced Hot Topic: Doing Things Differently – Don’t be Afraid	Redbird AB

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

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



## IGFOA Conference Vendor Showcase

Booth	Vendor	Booth	Vendor
1	MWM Consulting Group	29	Mesirow Financial
2	IGFOA	30	CliftonLarsonAllen LLP
3	BMO Harris Bank N.A.	31	Forecast5 Analytics, Inc.
4	Zions Bank	32	Federal Home Loan Bank of Chicago
5	Commerce Bank	33	Wintrust Financial
6	Moody's Investors Service	34	BKD LLP
7	Arthur J. Gallagher & Co.	35	Speer Financial, Inc.
8	Sikich LLP	36	CherryRoad and Oracle
9	Azavar Government Solutions	37	Empower Retirement
10	Plante Moran	38	Third Millennium Associates, Inc.
11	Foster & Foster	39	Tyler Technologies, Inc.
12	Graystone Consulting	40	Tyler Technologies, Inc.
13	Sebis Direct Inc.	41	Harris Local Government
14	Miller Cooper & Co., Ltd	42	GovHR USA
15	OpenGov, Inc.	43	Fifth Third Securities, Inc.
16	BS&A Software	44	Illinois Metropolitan Investment Fund (IMET)
17	Amalgamated Bank of Chicago	45	Promontory Interfinancial Network, LLC
18	Robert W. Baird & Co., Inc.	46	Lauterbach & Amen, LLP
19	Klein Hall CPAs	47	GMIS
20	PMA Financial Network, Inc.	48	GMIS
21	IML – Risk Management Association	49	GMIS
22	FirstMerit Bank	51	PFM Group
23	Siemens Industry, Inc.	52	GW & Associates, PC
24	Ehlers	53	Civic Systems, LLC
25	First Midwest Bank	54	JPMorgan Chase
26	Baker Tilly Virchow Krause, LLP	55	MB Financial Bank
27	AXA Advisors	56	InfoSend
28	Mitchell I. Serota & Associates Inc.	57	Multi-Bank Securities, Inc.
		60	Capital Gains Incorporated

## Vendor Showcase Mystery Dinner Theater

### Vendor Showcase Mystery Dinner Theater

#### “The Case of the Missing Green”

The IGFOA Executive Board discovered that \$25,000 is missing! Join your colleagues in a game of “Clue” to uncover:

*Who did it?*

*What happened to it? and,*

*Where did it take place?*

How to solve the mystery? Look for your official “Clue” game card in your registration materials with a list of Suspects, Financial Weapons, and Places. Attend the Vendor Showcase Mystery Dinner Theater on Sunday evening. In addition to a buffet dinner and open bar, there will be a chance to meet the suspects and visit exhibitors’ booths to gather clues. Do not miss the Alibi Review at 6:20 PM which will lead you to the correct solution!

Each Exhibitor’s booth will have a clue that eliminates one potential solution on the card. Ask each

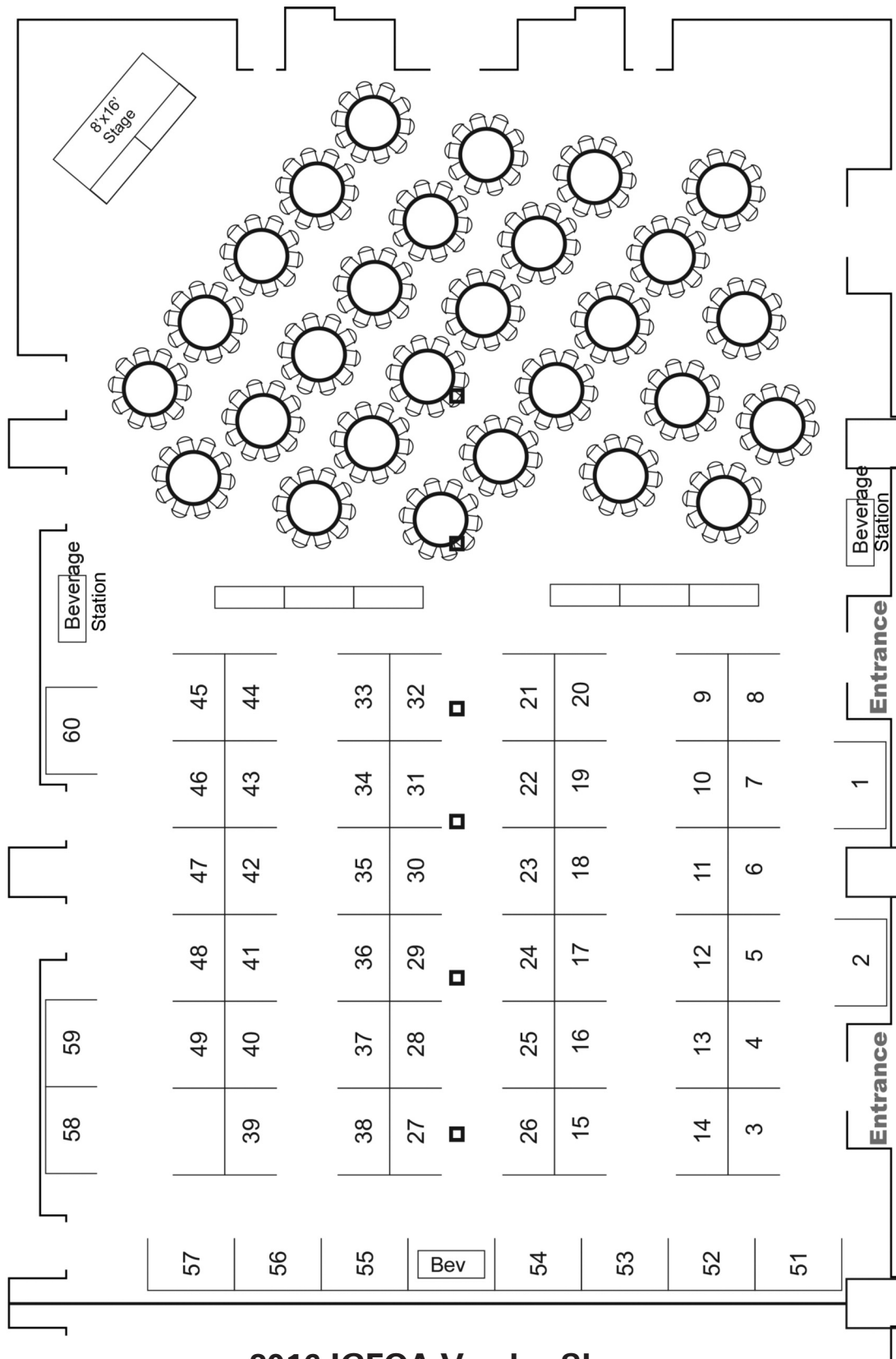
Exhibitor representative to initial your card next to the appropriate solution. There are 17 clues distributed among the exhibitors so the same clue will be at multiple vendors. However, your card only needs to be initialed once per potential solution.

When the card has initials for the 17 clues, make your final guess at the bottom and drop it in the Clue Briefcase Box at the registration desk.

Think you solved the mystery? Attend the Vendor Showcase Grand Closing on Monday for the big reveal and drawings for prizes!



## IGFOA Conference Vendor Showcase



**2016 IGFOA Vendor Showcase**  
**Bloomington/Normal Marriott**

## IGFOA Annual Conference Educational Sessions

Sunday, September 11, 2016

### Session 1: 1:00 PM–2:15 PM

#### *Hot Topic:*

### MY BUDGET IS TOO SMALL FOR BIG CITY INTERNAL CONTROLS: WHAT CAN I DO?

This session will cover common sense methods that can be implemented to reduce exposure to risks and fit the budget.

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

- Identify methods to reduce risks;
- Learn lessons from small towns;
- Understand the consequences from hard lessons;
- Define common sense alternatives to expensive forms of internal controls; and,
- Work on focusing efforts on these areas first.

**Speaker:** Jeremy Plank, CPA, C.J. Schlosser & Company, LLC

**Moderator:** Tamara K. Ammann, City of Collinsville

**CPE:** About 1.5 hours

**Field of Study:** Accounting (Governmental)

**Level:** Overview

### Session 1: 1:00 PM–2:15 PM

#### *Hot Topic*

### UNDERSTANDING THE BENEFITS OF P-CARDS AND A/P CARD PROGRAMS

Explore the advantages that P-card and A/P Card programs can give you thru increased efficiencies, lower Treasury Services costs, and new revenues from making payments differently.

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

- Understand how these programs function within your current environment;
- Identify potential efficiencies these programs can bring to your current payment processes; and,
- Understand the benefit of reduced fraud and liability risk these programs offer over current payment methods.

**Speaker:** Steve Pavletich, National Account Executive, Commerce Bank – Commercial Card Division

**Moderator:** Susan Wade, First Midwest Bank

**CPE:** About 1.5 hours

**Field of Study:** Finance

**Level:** Overview

### Session 1: 1:00 PM–2:15 PM

#### *Advanced Hot Topic*

### MATCHING INVESTMENT STRATEGY WITH PORTFOLIO OBJECTIVES

Who has time in a busy day to think about investments? Everyone is pressed for time, but prudently investing to meet the objectives of safety, liquidity and yield requires a well-planned approach. This session will discuss various investment strategies to help meet your community's specific investment needs. In addition, this session will review the process of issuing an RFP for investment services.

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

- Learn about various investment strategies;
- Better understand different types of investment providers; and,
- Gain insight from a Finance Director that has led the issuance of two investment RFPs.

**Speakers:** Brian Hextell, Institutional Portfolio Manager, Prudent Man Advisors, Inc.

Nikki Larson, CPA, Finance Director, Village of Vernon Hills

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

**CPE:** About 1.5 hours

**Field of Study:** Finance

**Level:** Intermediate

*IGFOA reserves the right to modify the agenda, sessions, and speakers*

**IGFOA Annual Conference Educational Sessions, *continued*****Sunday, September 11, 2016****Session 2: 2:30 PM–3:45 PM*****Hot Topic*****NEVER MISS A DUE DATE AGAIN: AN ANNUAL TIMELINE FOR LOCAL GOVERNMENT REPORTING**

This session will present a month-by-month timeline of the various reports and forms required to be completed and filed by local governments for the State of Illinois and the Federal Government. The timeline will include State and Federal tax filings, TIF reporting, Treasurers Report, Comptroller's Report, Department of Insurance reporting, debt disclosure requirements, GFOA award program due dates, ACA, single audit, unemployment reports, IMRF reporting and more. Each reporting requirement will be identified, whether there is additional assistance to complete, the applicable due dates, and the ramifications for missing deadlines.

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

- Learn about the various reports and forms required to be filed by Illinois and the Federal Governments throughout the year;
- Identify the due dates applicable to Illinois municipalities;
- Become aware of how to file the required reports and forms; and,
- Learn of potential ramifications for failing to meet required deadlines.

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

**Moderator:** Elizabeth Holleb, City of Lake Forest

**CPE:** About 1.5 hours      **Field of Study:** Accounting (Governmental)      **Level:** Overview

**Session 2: 2:30 PM–3:45 PM*****Hot Topic*****GET THE CHECK OUT OF HERE AND LET THE CASH IN–ELECTRONIC PAYMENT AND RECEIPT ALTERNATIVES**

Learn how to accelerate consumer receivables and automate paper checks in an effort to reduce costs and simplify operations for collections and disbursements. The upcoming rule changes for ACH payments will be reviewed.

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

- Find out what bill payment aggregation is and how it works;
- Learn how to streamline consumer online bill payments; and,
- Understand the upcoming rule changes for ACH payments.

**Speakers:** Kristen L. Saranteas, CTP, Head of Treasury Management, First Midwest Bank  
Bettina O'Connell, Finance Director, Village of Grayslake

**Moderator:** Thomas Dahl, Village of Roselle

**CPE:** About 1.5 hours      **Field of Study:** Finance      **Level:** Overview

**Session 2: 2:30 PM–3:45 PM*****Advanced Hot Topic*****TURNING YOUR FINANCIAL DATA INTO INFORMATION**

To be effective as municipal leaders, finance professionals must be strategists who turn data into information. Learn how one city is maintaining a wide field of view by building a budget and developing a long-term forecast as part of the same exercise. Organizing historical data and analyzing where you have come from presents the opportunity to better understand the "What if?" questions. This session will discuss how to organize, analyze, and report at all levels with the goal of creating opportunities for your organization and keeping stakeholders informed of potential outcomes.

**IGFOA Annual Conference Educational Sessions, *continued*****Sunday, September 11, 2016****Learning Objectives:** *Participants completing this session should be able to:*

- Receive a well-rounded introduction to several concepts in analytics.
- Have the opportunity to explore or consider the potential benefits of analytic strategies for their municipality including:
  - Understanding the 5 year impact of today's financial decisions;
  - More Effective Resource optimization & implementation;
  - Effective financial modeling and communication strategies with internal and external stake holders; and,
  - Implementing operational and strategic approaches based on financial projections.

**Speakers:** Matt Prozaki, Account Executive – National Sales Team; Forecast5 Analytics  
 Doug Cooper, Finance Director, Village of Brookfield

**Moderator:** Andrew Huhn, Town of Normal

**CPE:** About 1.5 hours **Field of Study:** Finance

**Level:** Intermediate

**Monday, September 12, 2016****8:30 AM–9:20 AM*****Keynote Address*****LEADERSHIP IN CHALLENGING TIMES**

Former Illinois Governor Jim Edgar will discuss the leadership skills and qualities essential to government professionals during times of uncertainty in the public sector.

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

- Identify skills generally demonstrated by successful government finance leaders
- Learn about common qualities shared by effective government finance professionals; and,
- Understand why successful leadership is important during challenging times.

**Speaker:** Governor Jim Edgar

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

**CPE:** About 1.0 hours **Field of Study:** Business Management & Organization **Level:** Overview

**Session 1: 9:30 AM–10:30 AM*****Hot Topic*****PREPARING A PAFR**

Learn about GFOA's awards program for the Popular Annual Financial Report (PAFR), a financial report specifically designed to be easily understandable to the general public, and hear about several organizations' experiences producing a PAFR.

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

- Understand the requirements of the GFOA, PAFR awards program;
- Identify the benefits of providing a PAFR to constituents; and,
- Learn the pros and cons of producing a PAFR.

**Speakers:** Bradley W. Wilson, CPFO, Finance Director, Village of Wood Dale  
 Mark Nannini, Chief Financial Officer, Illinois Municipal Retirement Fund  
 Andrew Brown, Deputy Director of Finance, Village of Buffalo Grove

**Moderator:** Todd Sholeen, FirstMerit Bank

**CPE:** About 1.0 hours **Field of Study:** Finance

**Level:** Overview

*IGFOA reserves the right to modify the agenda, sessions, and speakers*

**IGFOA Annual Conference Educational Sessions, *continued*****Monday, September 12, 2016****Session 1: 9:30 AM–10:30 AM*****Advanced Hot Topic*****GASB UPDATE**

This session will focus on reviewing new standards, agenda items, and potential future changes to be enacted by the Governmental Accounting Standards Board (GASB) and how such changes will affect Illinois local governments.

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

- Identify recently issued GASB pronouncements;
- Learn about current agenda projects at GASB; and,
- Understand how new GASB pronouncements, current agenda items, and other potential future changes may affect Illinois local governments.

**Speaker:** Brian Caputo, Ph.D., CPA, Chief Financial Officer/City Treasurer, City of Aurora

**Moderator:** Krisztina Dommer, Sikich LLP

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Intermediate

**Session 2: 11:00 AM–NOON*****Hot Topic*****ILLINOIS PERFORMANCE EXCELLENCE–THE IMRF STORY:  
HOW YOUR UNIT OF GOVERNMENT CAN START ITS OWN JOURNEY  
OF EXCELLENCE**

Learn about IMRF's Journey of Excellence as the Baldrige Criteria for Performance Excellence are implemented. The Baldrige Criteria were established by Congress and are administered by the Department of Commerce–National Institute and Standards and Technology. In the past, municipalities have received the National Baldrige Award. Locally, Illinois Performance Excellence (ILPEX) implements the Baldrige Criteria by training, fostering understanding, and helping organizations achieve excellence. IMRF follows Baldrige as the preferred and only approach to improving operations.

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

- Learn about the Baldrige Criteria for Performance Excellence;
- Explore IMRF's experience in implementing the Baldrige Criteria; and,
- Understand how the Baldrige criteria can be implemented locally.

**Speaker:** Louis W. Kosiba, Executive Director, Illinois Municipal Retirement Fund

**Moderator:** Barbara Maziarek, Village of Palos Park

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Overview

**IGFOA Annual Conference Educational Sessions, *continued*****Monday, September 12, 2016****Session 2: 11:00 AM–NOON*****Advanced Hot Topic*****CAPITAL IMPROVEMENT PLANNING AND FINANCING:  
THE HOW, WHEN, WHO, AND WHY?**

This session will focus on how a municipality deals with its endless list of capital projects. This session will discuss how to develop an achievable and fiscally sound capital improvement plan and options for financing that plan.

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

- Learn how to develop a realistic and fiscally sound capital improvement plan that meets the community's needs.
- Understand how software can facilitate the decision-making process by facilitating examination of multiple scenarios for project timing and cost; and,
- Explore the various financing mechanisms available to municipalities and understand the pros and cons of each option.

**Speakers:** Thomas J. Gavin, Managing Director, Baird  
Richard Schnuer, Finance Director, City of Champaign

**Moderator:** Jim Grammas, BMO Harris Bank

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Intermediate

**Session 3: 1:45 PM–2:45 PM*****Hot Topic*****PROCUREMENT FRAUD**

This session will review applicable procurement rules and fraud risks inherent in the procurement process, present the variety of other vendor fraud risks, and conclude with a discussion of fraud prevention and effective internal controls.

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

- Understand the general concepts of procurement rules and regulations;
- Identify fraud risks in procurement;
- Identify various fraud schemes engaged in by vendors; and,
- Learn effective controls to prevent procurement and vendor fraud.

**Speaker:** James M. Sullivan, J.D., CIG Director Dispute Advisory Services, Sikich, LLP

**Moderator:** Traci Pleckham, Village of Plainfield

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Overview

**IGFOA Annual Conference Educational Sessions, *continued*****Monday, September 12, 2016****Session 3: 1:45 PM–2:45 PM*****Advanced Hot Topic*****TAX CAPS, THE PROPERTY TAX FREEZE, AND RELATED CONSIDERATIONS**

Learn the latest from Springfield on potential Property Tax Freeze Legislation, what is PTELL and how it may impact everyone, how to mitigate the potential impact on your organization, and how to pay existing debt service and plan for future borrowings.

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

- Learn about the current status of the property tax freeze legislation;
- Gain an understanding of PTELL and property tax caps;
- Understand how the property tax freeze could impact their organization; and,
- Gain insight on solutions around the property tax freeze to pay for operations and debt service.

**Speakers:** Scott D. Anderson, Director of Finance/Treasurer, Village of Buffalo Grove  
 Kyle Harding, Partner, Chapman & Cutler LLP  
 Anthony Miceli, Senior Vice President, Speer Financial, Inc.

**Moderator:** Jamie Cunningham, Village of Lombard

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Intermediate

**GENERAL SESSION: 3:15 PM–4:45 PM*****Hot Topic*****SMALL THEFTS, BIG HEADACHES: WHAT TO LOOK FOR AND HOW TO MOVE FORWARD**

This session will feature practitioners' experiences with small but not uncommon fraud activities within local governments. A public official will share a real-life story of fraud within the government, how it was found, what procedures were followed after the discovery, and the aftermath, including how the work environment and relationships changed. It will also address how to present fraud or suspected fraud to the Governing Board and suggestions on how to rebuild trust as well as public and personal reputations.

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

- Become more familiar with the areas susceptible to "small" frauds and how to mitigate the risk of occurrence;
- Gain a better understanding of the internal and external considerations of identifying fraud in a local government; and,
- Develop strategies to communicate fraud to others, while protecting the local government and trustees

**Speakers:** Susan R. Jones, CPA, Miller Cooper & Co., Ltd.  
 H. Bryan Callahan, CPA, CFF, CFE, CVA, Director/Forensics & Valuation Services, BKD LLP  
 Stephanie Masson, CPFO, Finance Director, City of Rock Island

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

**CPE:** About 1.5 hours

**Field of Study:** Business Management & Organization **Level:** Overview



**IGFOA Annual Conference Educational Sessions, *continued*****Tuesday, September 13, 2016****8:30 AM–9:45 AM*****General Session*****2016 LEGISLATIVE UPDATE**

Participants will hear updates on State legislative matters relevant to Illinois local governments.

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

- Gain knowledge of new Illinois Public Acts significantly affecting local governments;
- Understand pending Illinois General Assembly legislative proposals that may significantly impact local governments; and,
- Become familiar with the status of State budget issues and how Illinois local government revenues may be affected.

**Speaker:** Joe McCoy, Legislative Director, Illinois Municipal League (IML)

**Moderators:** William McCarty II, Director – Office of Budget and Management, City of Springfield  
Michael Mondschain, Finance Director, Village of Wheeling

**CPE:** About 1.5 hours

**Field of Study:** Finance

**Level:** Overview

**Session 1: 10:00 AM–11:00 AM*****Hot Topic*****THE “CARE AND FEEDING” OF NEWLY ELECTED OFFICIALS**

Many times during the transition period after an election, there are new faces. How many municipalities have a formal orientation process for newly elected officials that encompasses the basics of municipal finance from a public administration rather than a political process? This session will offer suggestions for getting through “first” such as budget, audit, and debt issuance, with new elected officials. Greater communication and understanding fosters unity in navigating the challenges of public finance and doing more with less in today’s economic reality.

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

- Formulate assessment and training objectives for newly elected officials;
- Understand sample training tools provided by speakers; and,
- Improve the communication on technical matters between elected officials and financial employees.

**Speakers:** Rachel Musiala, CPA, Director of Finance, Village of Hoffman Estates  
Julie Zolghadr, Manager-Budget Division, City of Springfield

**Moderator:** Bob Cafarelli, Zions Bank

**CPE:** About 1.0 hours **Field of Study:** Business Management & Organization **Level:** Overview

**Session 1: 10:00 AM–11:00 AM*****Advanced Hot Topic*****GETTING FINANCE TO THE TABLE: BUILDING A COMPLETE TEAM FOR COLLECTIVE BARGAINING**

This session will provide an overview of the collective bargaining process, highlighting the essential elements of a contract and the most common discussion points. The session will also explore why it is essential for Finance to be at the table from the beginning and possible consequences when they are not. Finally, the session will provide tips on how to convince management to add Finance to the bargaining team, if they are not already there.

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

- Gain basic knowledge of the overall collective bargaining process;
- Understand why finance should be included at the beginning of negotiations; and,
- Learn tips on how to persuade management that finance is an integral part of the collective bargaining team.

*IGFOA reserves the right to modify the agenda, sessions, and speakers*

**IGFOA Annual Conference Educational Sessions, *continued*****Tuesday, September 13, 2016**

**Speakers:** Bill Hannah, Finance Director, Village of North Aurora  
 Chris Minick, Finance Director, City of St. Charles  
 Matt Roeschley, J.D., Deputy City Manager, City of Champaign

**Moderator:** James P. Gibbs Jr., AXA Advisors LLC

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Intermediate

**Session 2: 11:15 AM–12:15 PM*****Hot Topic*****UTILIZING LEAN THINKING TO SAVE TIME AND MONEY**

This session will provide insight about how the Lake County Planning Department utilized Lean principles to improve business processes, ultimately saving time and money.

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

- Learn about the eight most common types of waste in administrative processes; and,
- See how Lake County Planning Department utilized Lean principles to improve processes;
- Identify key metrics that can be used to quantify process improvements.

**Speaker:** Anita Patel, Business & Finance Administrator, Lake County Planning, Building & Development Department

**Moderator:** Kim Feeney, MB Financial Bank

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Overview

**Session 2: 11:15 AM–12:15 PM*****Advanced Hot Topic*****DOING THINGS DIFFERENTLY–DON'T BE AFRAID**

Today government agencies are required to provide more services with fewer dollars. Information Technology (IT) is the nervous system of any organization, giving it a unique perspective since all information passes through its systems. This session will show you how you can tap into IT's knowledge base by collaborating with them to explore ways to make processes more efficient, resulting in higher quality services to constituents. Efficiencies can only be achieved by exploring opportunities for change. The phrase "we have always done it that way" can be a barrier to implementing these changes. In this session, we will present some real-world examples of how change was implemented successfully and what lessons were learned through those experiences. You can then use these as models to help you explore different ways of achieving improved efficiencies and productivity in your own organization.

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

- Become familiar with change management methods;
- Learn how to leverage IT to positively affect change; and,
- Understand why project management is essential and not a luxury.

**Speakers:** Dave Buwick, Chief Information Officer, DuPage County Health Department  
 Brian Johanpeter, Information Technology Director, City of Mattoon

**Moderator:** Tim Gavin, Klein Hall CPAs

**CPE:** About 1.0 hours

**Field of Study:** Finance

**Level:** Intermediate



Illinois Government Finance Officers Association 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.learningmarket.org](http://www.learningmarket.org).

## IGFOA Annual Conference Speaker Information

**Scott Anderson** was appointed the Director of Finance and Treasurer for the Village of Buffalo Grove in 2006. Prior to that position, he was the Assistant Finance Director for the Village of Buffalo Grove. He is the current Past President of the Illinois Government Finance Officers Association (IGFOA), a Trustee of the Illinois Metropolitan Investment Fund (IMET), and a member of the national Government Finance Officers Association (GFOA). Scott received his Bachelor's degree from Arizona State University and Master's Degree in Public Administration from Northern Illinois University.

**Andrew Brown** is the Deputy Director of Finance for the Village of Buffalo Grove, Illinois, serving in that capacity since May of 2014. He has a BA in Accounting from Western Michigan University in 2005; during his tenure there, he served on the Executive Board of Beta Alpha Psi, the international honors organization for financial information professionals. In 2010, he completed his Masters in Professional Accounting from Elmhurst College. Andrew has over 10 years of Governmental Accounting experience that includes over 8 years at The Town of Cicero prior to his current position. Andrew oversees the day to day operations of the Finance and General Services Department, which includes utility billing, accounts payable, accounts receivable, licensing, and customer service. Other responsibilities include coordinating the annual audit, Popular Annual Financial Report, sections of the annual budget, and strategic plan initiatives and projects Village wide. The Village of Buffalo Grove has received the Government Finance Officers Association Certificate of Achievement for Excellence in Financial Reporting for thirty-three consecutive years, Distinguished Budget Presentation Award four consecutive years and the Popular Annual Financial Reporting Award 2 consecutive years. The Village maintains a "Aaa" bond rating from Moody's and Standard and Poor's Investors Services, which is the highest bond rating achievable by a governmental entity. Andrew serves as a staff liaison to the Buffalo Grove Days Committee and Buffalo Grove Symphonic Band. Public and professional contributions include membership to the Government Finance Officers Association (GFOA), Illinois Government Financial Officers Association (IGFOA), and Midwest Association of Public Procurement (MAPP). Andrew serves IGFOA in multiple capacities; Executive Board Member Non-CFO, chair of the Assistant Finance Directors Network, chair of the Young Professionals Network, and member of the Professional Education Committee. He also sits on the Finance Committee for the Northwest Municipal Conference.

**Dave Buwick** has devoted his career to public service for over 28 years and has participated in government at the district, municipal, county, and federal levels. He is currently serving as the Chief Information Officer for the DuPage County Health Department, Wheaton, Illinois.

He previously served as an Information Technology Project Manager and Network Administrator for the City of Naperville, Illinois, and as Systems Manager for the Naperville Park District. Dave has been responsible for many change initiatives for the public sector. These projects include implementing network infrastructure, public safety in car video systems, electronic meeting agenda and video content delivery systems, health inspection and permitting systems, security infrastructure, developing IT strategic plans, and managing the migration from on premise to "Cloud" based applications and data storage systems. Dave is a certified PMI Project Management Professional (PMP). He holds a B.A. in Political Science from Miami University in Oxford, Ohio and a Leadership Certificate from North Central College, Naperville, Illinois. He also completed the American University Washington Semester Program in American Government in Washington, D.C.

**H. Bryan Callahan, CPA, CFF, CFE, CVA** is a member of BKD's Forensics & Valuation Services division and specializes in providing litigation consulting, fraud investigation and forensic accounting services. He has extensive experience in litigation support and forensic services, including calculations of breach of contract damages, lost business value, intellectual property claims, securities litigation, shareholder disputes, post-acquisition disputes, misappropriation of assets and fraudulent financial reporting. Bryan has performed litigation and investigation services for companies in a variety of industries, including multiple Fortune 500 companies. He has testified as an expert witness both in court and through depositions. Bryan has experience with data analysis software for forensic data mining and continuous auditing. He also works with counsel on e-discovery and computer forensic engagements using a wide array of forensic imaging and analysis tools. Bryan previously worked in corporate forecasting, planning, and analysis for a \$370 million private equity-owned biotechnology company, where he led the companywide annual operating plan, forecasting and reporting processes. He also was responsible for external and board financial materials, decision support and competitive analysis. Bryan worked previously as an auditor at BKD and an international accounting firm. In addition to being a CPA, Bryan holds the Certified in

## IGFOA Annual Conference Speaker Information, *continued*

Financial Forensics (CFF) certification from the American Institute of Certified Public Accountants (AICPA) and is a Certified Valuation Analyst (CVA) and Certified Fraud Examiner (CFE). He participates in more than 60 hours of continuing education each year and has attended numerous valuation, litigation services, damages, and fraud courses offered by AICPA and Association of Certified Fraud Examiners (ACFE). He is a summa cum laude graduate of Valparaiso University, Indiana, with a B.S. degree in accounting and management.

**Brian W. Caputo, Ph.D, CPA, CPFO** became the Chief Financial Officer/City Treasurer for the City of Aurora in 1998. Previously, he held the positions of Director of Finance/Treasurer for the Village of Mount Prospect and Assistant Finance Director for the Villages of LaGrange and Hoffman Estates. Mr. Caputo also worked as an auditor with Price Waterhouse in Chicago. In July of 2015, Mr. Caputo became a member of the Governmental Accounting Standards Board. He is also an adjunct professor of public finance at Northern Illinois University (NIU). He is a past president of the Illinois Government Finance Officers Association (IGFOA) and a past chair of the IGFOA's Technical Accounting Review Committee. Mr. Caputo holds a B.S. from the United States Military Academy, an M.S. in Accountancy from DePaul University, and an M.P.A. from NIU. He earned a Ph.D. degree from NIU with fields of study in public administration, public policy, and government finance. He is a Certified Public Accountant and a Certified Public Finance Officer. In 2004, Mr. Caputo retired from the United States Army Reserve as a lieutenant colonel. During his more than 22 years of active and reserve military service, he specialized in financial and human resources management.

**Doug Cooper** is the current Finance Director for the Village of Brookfield. Prior to this, Doug served the Village of Hinsdale as well as the Winnetka Park District for over 10 years in various financial roles. A 1985 Graduate of Northern Illinois University, Doug entered the public accounting industry serving mainly Governmental Clients. From this background, Doug developed an appreciation of the nuances and excitement of governmental accounting and has never looked back. While working for the Village of Brookfield, Doug developed the Village's first 5 year-plan and corresponding two-year budget. As part of this process, Doug worked closely with all department heads to educate them on the importance of long-term planning and realistic assumptions. Doug earned his C.P.A. Certificate in 1989, after a grueling four year study regimen. He is a member of the AICPA, ILCPAS, GFOA, and IGFOA.

**Governor Jim Edgar** has served as a Distinguished Fellow at the University of Illinois' Institute of Government and Public Affairs where he is a teacher and lecturer since 1999. Governor Jim Edgar's career in government spans 30 years. He worked in the legislative branch of government for 10 years, which included his election to the Illinois House of Representatives. Governor Edgar served for 20 years in the executive branch of government including 10 years as Secretary of State and eight years as Illinois' 38th Governor. He was first elected Governor in 1990 and reelected in 1994 by the widest margin in Illinois history. In addition, Governor Edgar made children a priority. His historic efforts in establishing a minimum foundation level in our public schools has made it possible for children from all areas of the state to receive an adequate education. He also initiated programs that took Illinois from the bottom to the top of the 50 states in the number of adoptions each year. Governor Edgar serves on a variety of civic and corporate boards. Governor Edgar is a member of the Board of the Chicago Council on Global Affairs. He is the President Emeritus of the Abraham Lincoln Presidential Library Foundation.

**Thomas J. Gavin**, Managing Director, Manager of Baird's Illinois Public Finance Operations has 40 years of experience in public finance and joined Baird in 1994. Mr. Gavin has worked directly with many major and local issuers on over a thousand transactions for over \$30 billion and up to \$3 billion of public financings per year. His experience has included key roles in financings for the States of Illinois, Michigan and Nevada, the Cities of Baltimore, Chicago, and Detroit as well as for issuers throughout Illinois such as Champaign, Downers Grove, DuPage County, Galena, and Peoria. He has structured many state and local government, general obligation, tax increment, lease revenue, recreation, public power, university, housing, hospital and industrial development financings. He has spoken before municipal bond industry groups and written for industry publications. Three of the transactions on which he served won recognition by The Bond Buyer as "Deal of the Year". Mr. Gavin is a National Association of Securities Dealers, Registered General Securities Representative (Series 7), as well as a Municipal Securities Rulemaking Board Registered Municipal Principal (Series 53). He received his Bachelor of Science Degree in Accounting from Wayne State University School of Business in Detroit, Michigan.

**Bill Hannah**, Finance Director, Village of North Aurora has worked in the field of government finance and administration for over 20 years. Currently, he is serving as Finance Director/Treasurer for the Village of North



## IGFOA Annual Conference Speaker Information, *continued*

Aurora where he has held that position since 2005. Previously, he was employed with the City of Wheaton for 4 years and the Village of Barrington for 7 years in various finance and administrative capacities. Bill graduated from Northern Illinois University in De Kalb in 1996 with a Masters in Public Administration. He graduated from Illinois Benedictine College in 1994 with a major in Business Economics. Bill has also earned the Certified Public Finance Officer (CPFO) designation from the Government Finance Officers Association of the United States and Canada. Bill is an active member of GFOA, IGFOA, and other organizations and has been a frequent speaker on various topics including governmental accounting, revenues, budgeting, pensions, IT and other related topics. Bill served as a team leader on the IGFOA Professional Development Committee for several years, was chair of IGFOA's Technical Accounting Review Committee and currently serves on the IGFOA Executive Board. During Bill's 10 years as Director, North Aurora has received every year both the GFOA Certificate for Excellence in Financial Reporting and GFOA Distinguished Budget Presentation Award. Bill has also served as a budget reviewer for GFOA's Distinguished Budget Presentation Award Panel for 14 years and previously served on the Citizens Finance Advisors Board of the St. Charles School District for 7 years.

**Kyle Harding** is a partner in the Illinois Public Finance Department of Chapman and Cutler LLP. He joined the firm in 2005 after participating in the firm's summer associate program in 2004. His practice includes acting as bond counsel, disclosure counsel and underwriter's counsel on governmental use bond financings. Kyle routinely advises issuers, investment banks, commercial banks, and financial advisors on state and federal tax law matters related to the structure and sale of governmental obligations. He also provides counsel on various disclosure and securities law matters, including SEC and MSRB rules and regulations governing the municipal securities market. Kyle is a frequent panelist and speaker on public finance and regulatory topics, including post-issuance compliance, county school facility sales tax, and election interference. Mr. Harding's education credentials are University of Michigan Law School, J.D., 2005, Associate Editor, Michigan Journal of Law Reform, Kalamazoo College, B.A., magna cum laude, 2002. Mr. Harding is a member of Illinois Association of School Business Officials (Service Associate).

**Brian D. Hextell** is an Institutional Portfolio Manager and is a registered Investment Advisor Representative with Prudent Man Advisors. As a Senior Vice President, he

is responsible for leading the credit research effort for financial institutions and contributes to portfolio management and trading. Mr. Hextell first joined PMA Financial Network, Inc. in 1999 after graduating from Northern Illinois University with a degree in Finance. He later earned an MBA from DePaul University. His FINRA licenses are the Series 7 and 66. Since 2004, Mr. Hextell has led PMA Financial Network's Credit Risk Management Department, which is responsible for determining the creditworthiness of all investments made by PMA's public entity clients and employing various strategies for securing client deposits. His other responsibilities include reviewing client investment policies to determine appropriate client investments and collateral requirements. As an Institutional Portfolio Manager, he is responsible for client service and developing and implementing investment strategies for many of Prudent Man Advisors' clients. Mr. Hextell frequently speaks at city, school and county conferences and seminars on the topics of state statutes, investment policies, credit analysis, economic updates, and investment strategy.

**Brian P. Johanpeter**, Information Technology Director for the City of Mattoon, Illinois is responsible for managing and supporting the technology resources in all of the departments of the City of Mattoon. With help from one assistant and a consulting company, the Computer Information Services (CIS) department takes care of more than 150 computers and servers, the network connecting them together, the operating systems and software running on them, as well as the people using all of them. Brian has been with the city since starting as the Technology and Outreach Coordinator at the Mattoon Public Library in 2001. As need for centralized technology arose within the city, Brian migrated into the role of the city's first network administrator in 2002. Since then, Brian has worked with management to create a separate CIS department and bring his position up to the director level to ensure CIS is involved in planning at the highest level. Brian holds a Bachelor of Arts in Communication from Truman State University and a Master of Arts in Speech Communication from Eastern Illinois University, where his studies focused on Organizational and Computer Mediated Communication. Despite the formal education in the communication field, Brian has been working with computers and technology since 1983 when he wrote his first program on a Radio Shack TRS-80 computer. The communication degrees have helped Brian hone the skills necessary to succeed at what he does best: help others leverage technology to get their job done. Brian is a member of the professional

## IGFOA Annual Conference Speaker Information, *continued*

organization Government Management Information Sciences (GMIS) International and its state chapter, GMIS Illinois. He is a former president of GMIS Illinois and still serves on the board as its membership chair.

**Susan R. Jones, CPA, MBA** is the leader of Miller Cooper's Institutional Services Group and has overall responsibility for coordinating all of Miller Cooper's services to her clients. In addition to handling the accounting and audit needs of her clients, she consults with clients regarding planning and various organizational matters, and shares best practices from working with a variety of organizations. Ms. Jones joined Miller Cooper from a national accounting firm in which she had more than 20 years experience serving a broad range of governmental, nonprofit, and public audit clients. Ms. Jones has managed numerous tax-exempt bond offerings and advised clients on the requirements of OMB Circular A-133 and other federal requirements. Ms. Jones received a Bachelor of Science in Accounting from the University of Illinois-Champaign/Urbana. She also received a Master of Business Administration from DePaul University: Kellstadt Graduate School of Business. Ms. Jones is a member of the Illinois CPA Society and its Not For Profit Committee, the American Institute of Certified Public Accountants, the Illinois Association of School Business Officials, and Illinois Government Finance Officers Association. She is also Treasurer of the Illinois Biotech Organization and on the Board of Goldie's Place.

**Louis W. Kosiba**, IMRF Executive Director, joined the IMRF in 1988, and has served as Executive Director since 2001. Prior to his appointment as Executive Director, Kosiba was the IMRF General Counsel between 1990 and 2001. Before coming to IMRF, Kosiba was General Counsel to the Illinois Teachers' Retirement System. Kosiba has a Juris Doctor degree and a Master's in Business Administration from the University of Illinois in Urbana-Champaign. He is also a Certified Employee Benefit Specialist, a designation conferred by the Wharton School of the University of Pennsylvania. He is a member of the Board of Trustees for Illinois Performance Excellence (which trains Illinois organizations in the Baldrige Criteria for Performance Excellence) and is on the Leadership Team for Generations Serving Generations. As Executive Director of the IMRF, Kosiba speaks throughout Illinois and nationally on retirement issues, oversees a staff of nearly 200 and reports directly to the eight-member IMRF Board of Trustees. With assets of approximately \$34 billion, IMRF is the best-funded statewide public pension plan in Illinois.

**Nikki Larson** is the Finance Director for the Village of Vernon Hills, where she has worked for the past 2 years. In Vernon Hills, she is responsible for coordinating the day-to-day operations of the Finance Department, the annual budget, audit, general accounting, risk management, and administration of the Human Resources Division. Prior to working for the Village of Vernon Hills, Mrs. Larson was the Deputy Finance Director and subsequently Finance Director at the City of Highland Park, where she worked for three years. Prior to that, Ms. Larson was the Accounting Manager at the Village of Palatine, where she worked for seven years. Mrs. Larson is a Certified Public Accountant and has a Bachelor of Science in Business Administration/Accounting from Roosevelt University and a Master's Degree in Business Administration for Northern Illinois University. Mrs. Larson is a CPA, and a member of the AICPA and Illinois CPA Society. She is also a member of GFOA, IGFOA and is currently the Vice President of the IGFOA Chicago-Metro Chapter Board.

**Michael Malatt, CPA**, Senior Manager with Baker Tilly Virchow Krause, LLP, has been in the accounting industry since 2007 as a member of the firm's Public Sector Practice Group. Michael has extensive experience with counties, municipalities, and special districts, specializing in providing financial audits, compliance audits, and accounting services. Michael is a member of the IGFOA's Professional Education Committee (PEC), GFOA's Special Review Committee, AICPA, and Illinois CPA Society. Michael obtained a Bachelor of Business Administration in Accountancy and Mathematics and a Master of Science in Accountancy from the University of Notre Dame. Michael received the 2008 Excel Award from the Illinois CPA Society for outstanding achievement on the Uniform CPA Examination in Illinois.

**Stephanie Masson**, Finance Director of the City of Rock Island since 2016 previously worked at the Village of Park Forest Illinois where she held the position of Assistant Finance Director from 2006 to 2016 and Accounting Supervisor for three years prior to that post. As Finance Director, she is responsible for planning, organizing, and directing all operations of the Finance Department including budgeting, collections, accounting, treasury, and other fiscal activities. Prior to her work in local government, she was employed for seven years in various finance and accounting positions in the healthcare industry. Stephanie holds a Bachelors degree in Accounting from Governors State University. She is Past President of the South Metro Chapter of the Illinois Government Finance

## IGFOA Annual Conference Speaker Information, *continued*

Officers Association (IGFOA) and is currently serving as Vice President on the IGFOA Executive Board. She completed GFOA's Certified Professional Finance Officer (CPFO) designation in 2012.

**Joe McCoy**, Illinois Municipal League, Legislative Director, has been with the League since 1999. His focus is on labor, insurance, revenue, personnel, and pension issues that come before the General Assembly. He also coordinates content for the legislative website, pension policy page, social media communications, and all publications generated by the Legislative Department. Mr. McCoy works closely with the IML Managers' Committee and represents municipal interests before the Illinois Department of Insurance's Pension Services Advisory Committee. He is originally from Oak Lawn and holds a Masters Degree in Public Policy.

**Anthony F. Miceli**, Senior Vice President, Speer Financial has a B.S., North Central College, Naperville, IL, with majors in both Finance and Economics. He previously served in the public finance department of a Milwaukee, WI based investment banking and financial services firm. Mr. Miceli is a member of the Illinois Government Finance Officers Association. Mr. Miceli has been employed by Speer Financial since 2013.

**Christopher A. Minick** currently serves as the Finance Director for the City of St. Charles Illinois. He has served in this position since April of 2008 and he has over 26 years of experience in municipal management, governmental auditing, accounting, and finance. Chris is currently the Treasurer on the Executive Board of the Illinois Government Finance Officers Association and a member of the Board of Directors of the Illinois Metropolitan Investment Fund. He is also a Trustee on the City of St Charles' Police Pension Fund and Firefighters Pension Fund. Previously Chris served as the Village Administrator for the Village of Plainfield, Illinois for approximately 3 years. Prior to his appointment as Village Administrator, Chris served as the Village of Plainfield's first Finance Director/Director of Management Services for approximately 7 years. Chris has participated in numerous collective bargaining processes for the municipalities he has represented. He represents management at the bargaining table in contract negotiations with unions covering Police, Fire, Public Works, and Electric Utility employees. He also has experience in mediation and Interest Based Bargaining. He was part of the management team, which successfully negotiated

a wage freeze with the City of St Charles' 5 collective bargaining units during the 2009-2010 fiscal year. Chris also served as the Senior Accountant for the Wheeling Park District for approximately two years, and began his career performing financial statement audits of local governmental units for CPA firms in the Chicago region. Chris spent approximately six years performing audits and has audited cities and municipalities, townships, library districts, park districts, counties, and state agencies. He has also participated in revenue compliance audits of cable television franchises on behalf of municipalities. Chris has a Bachelor of Science Degree in Accounting and Finance from St. Joseph's College in Rensselaer, IN.

**Rachel Musiala** has been with the Village of Hoffman Estates for over twenty years. She started with the Village as the Accountant in 1995 and moved on to Fiscal Operations Manager, Assistant Director, and then onto Director of Finance, the position she currently holds. She earned a Bachelor's Degree in Accountancy from Northern Illinois University and is a Certified Public Accountant. Rachel has been a part of the Budget Review Panel for the GFOA Distinguished Budget Presentation Awards Program for many years and has completed the GFOA Advanced Government Finance Institute. Rachel has been involved with the Illinois GFOA Technical Accounting Review Committee and the Professional Education Committee (PEC), and she is currently the chairperson for PEC. Finally, Rachel is also a Certified Pension Fund Trustee.

**Mark F. Nannini** is the Chief Financial Officer for Illinois Municipal Retirement Fund. He previously worked as Director of Finance/Treasurer for the City of Crystal Lake, Director of Finance City of Rolling Meadows, and Comptroller Village of Niles. As of 12/31/15, IMRF has 174,098 active members, 118,038 benefits recipients and 121,664 inactive members, \$35 billion in assets under management. The plan is administered under an Agent Multiple Employer plan. Mr. Nannini has a M.B.A. in Finance and an Undergraduate Degree in Accounting. He is a National Budget Reviewer for Government Finance Officers Association and a member of the IGFOA Technical Accounting Review Committee.

**Bettina O'Connell** is the Finance Director for the Village of Grayslake. She has worked for the City of Highland Park and the Village of Grayslake for a combined 28 year of experience. She serves as the Treasurer for the Village



## IGFOA Annual Conference Speaker Information, *continued*

of Grayslake as well as the Grayslake Police Pension Board. She is a graduate of Columbia College of Missouri with a Bachelor's Degree in business administration. Bettina is a Certified Illinois Municipal Treasurer and also received her Certified Public Investment Manager certification in 2010, and is a member of the Illinois Government Finance Officers Association (IGFOA) as well as the Illinois Municipal Treasurers Association (IMTA). She also serves as the Treasurer for local Cub Scout Pack 627.

**Anita Patel** has worked in municipal and county government for over 15 years and is currently the Business and Finance Administrator for the Lake County Planning, Building & Development Department. In this role, Anita is responsible for managing the department's financial processes ranging from budget to accounts receivables/payables. In addition to overseeing the financial processes, Anita works with staff to identify business process improvements to operations. She utilizes her Lean Six Sigma training from Northern Illinois University to develop staff competencies as it relates to analysis of processes. Anita has experience working with teams to create workflow diagrams, discuss root causes of problems, and identify solutions. She also led a team through the implementation of Oracle's Hyperion Public Sector Planning & Budgeting software. She was selected to present a case study about the implementation at an Oracle User Conference- Collaborate 2015. Anita has her MPA from Arizona State University and is a member of ICMA.

**Steve Pavletich** is a National Account Executive and Vice President for Commerce Bank. He is responsible for establishing and maintaining relationships with prospective clients. He provides consultation to CFOs and controllers in their AP and procure-to-pay processes, including everything from invoice presentment through payment and reconciliation. Steve specializes in health-care, education, and government entities. Steve is an Accredited Payables Solutions Consultant (APSC) and has 16 years of experience in the commercial card industry.

**Jeremy Plank**, a certified public accountant, has more than ten years of experience, both on the inside of public and private organizations and as an outside auditor. He has developed and implemented the internal control procedures for organizations both large and small. Working now as an outside auditor, Mr. Plank has been in charge of the field audits of numerous cities, villages,

and townships. He has seen varying degrees of procedures and gives presentations on improving internal controls within the limitations of small organizations. Mr. Plank is a member of the Illinois Government Finance Officers Association, the Association of Certified Fraud Examiners, the American Institute of Certified Public Accountants and the Illinois Society of Certified Public Accountants. Mr. Plank has a Bachelor's degree in Accountancy and a MBA from Southern Illinois University Edwardsville. He also has a Bachelor's degree in Pastoral Studies from North Central University, Minneapolis, MN. He grew up in a small town where there were no stoplights or team try-outs. He understands a small town approach where budgets are tight and pragmatism wins the day. Mr. Plank's hometown roots coupled with his education and experience have shaped his perspective to have something to offer to organizations large and small.

**Matthew Prozaki** is an Account Executive on the National Sales Team of Forecast5 Analytics. He travels to conferences, workshops, and training sessions around the country sharing the power of Forecast5 Analytics platform with local government leaders. Matthew attended Walsh College of Accounting & Finance in Troy, MI and earned a General Business degree. His favorite hobbies include playing golf and officiating amateur hockey. Matthew officiated for professional hockey for a living for ten years and traveled all over North America chasing his dream of becoming an NHL on ice official before starting his sales career.

**Matt Roeschley** has been with the City of Champaign since December 2011. Prior to his appointment to Deputy City Manager, he worked as an Assistant City Attorney in the Legal Department. In addition to overseeing various City Departments, Mr. Roeschley also serves as Deputy Liquor Commissioner, having been appointed by the Mayor. Prior to joining the City of Champaign, Mr. Roeschley practiced law in the Chicago area, representing governmental entities in a variety of matters, including labor relations matters and collective bargaining. Mr. Roeschley holds a Juris Doctor degree from Northern Illinois University College of Law and a Bachelor of Arts degree in History and Writing from Anderson University.

**Kristen Saranteas** is Senior Vice President, Head of Treasury Management at First Midwest. She has almost 25 years in sales and management experience and worked most recently with Wintrust Financial Corporation leading the Treasury Sales, Solutions, and Support

## IGFOA Annual Conference Speaker Information, *continued*

team. Prior to joining Wintrust, she was Senior Vice President and Regional Head of Cash Management at Royal Bank of Scotland (Citizens Financial Group). Her extensive treasury management background also includes American National Bank and The Northern Trust Company. She received a Bachelor of Arts from Miami University, and has volunteered with multiple organizations, like Chicago Cares and Working In The Schools, and in the capacity of the board of directors for City Year Chicago and The Goulden Touch, among a few. Kristen speaks frequently at industry conferences and events, most notably at the Windy City Summit and the Association of Financial Professionals Annual Conference.

**Richard Schnuer**, Finance Director with the City of Champaign leads the Finance Department in providing the full range of municipal financial services including financial planning and budgeting; financial operations; investments; debt management; financial reporting; and records management. The Finance Department also provides financial analysis to the City Council and staff on economic and community development issues. Mr. Schnuer is the Treasurer of the Champaign Firefighters Pension Fund and a member of the Fund's Board of Trustees. He also serves as Co-chair of the City's Capital Improvements Review Team, which develops the City's Capital Improvements Plan. Mr. Schnuer received a Masters of Business Administration Degree with a Concentration in Public Management from the University of Chicago Booth School of Business, 1979 and a Bachelor of Arts Degree, Tufts University, 1975. Mr. Schnuer has been the Finance Director for the City of Champaign from 1985 to present. Prior to that he was the City Administrator, City of Geneseo, Geneseo, Illinois, 1983 to 1985, Assistant City Administrator and Director of Community Development, Takoma Park, Maryland, 1982 to 1983, Presidential Management Intern and Budget Analyst, U.S. Department of Labor, Washington, D.C. 1979 to 1982, Governor's Fellow, Illinois Bureau of the Budget, Summer 1978, and Program Director, Medford Community Center, Medford, Massachusetts, 1976-1977. Mr. Schnuer is a past President of the Illinois Government Finance Officers Association and is currently a member of the Committee on Retirement and Benefits Administration of the Governmental Finance Officers Association of the U.S. and Canada. He makes frequent presentations to state, national, and international audiences, and has authored several articles for professional publications.

**James Sullivan, JD** is a Director, Dispute Advisory Services for Sikich LLP. As a former State Prosecutor and Inspector General of the Chicago Public Schools, Jim Sullivan has been investigating allegations of waste, fraud, financial mismanagement, and employee misconduct

for more than 21 years. Jim now conducts internal investigations and advises Sikich clients in proper internal controls to reduce the risk of fraud. Sullivan, whose specialties include internal controls assessments and improvement, and fraud investigation, previously served for 12 years as the Inspector General for the Chicago Board of Education. During his tenure, Sullivan's office investigated and exposed multi-million dollar fraud schemes committed by vendors, resulting in criminal convictions and the civil recovery of funds from those vendors. Additionally, he led investigations that uncovered some of the largest employee-orchestrated theft schemes in local government. As Inspector General, Sullivan also served as a member of the Chicago Board of Education's Audit Committee. He earned his JD from John Marshall Law School and holds a bachelor's degree in sociology and criminal justice from Benedictine University.

**Brad Wilson** is the Finance Director for the City of Wood Dale. He graduated from North Central College, Naperville, IL with a double BS in Finance and Economics, and from Roosevelt University, Chicago, IL with a MS in Accountancy. He received his CPFO during the spring of 2015. He has worked in local government for over 13 years, starting out as the Accountant for the Village of Glenview. Prior to his work in local government, he worked for Smith Barney where he had his Series 7 and 63 licenses. While there, he focused mainly on Retirement Planning before moving into compliance and operations. He served as Co-Chair of the Intergovernmental Personnel Benefit Cooperative (IPBC) strategic plan, Vice-Chair of the Finance and Operations Committee, At-Large member representative, served on the ad hoc Investment Committee, and is currently the Medium member representative. He is member of GFOA, IGFOA, and is current the Past President for the Chicago Metro Chapter of the IGFOA.

**Julie Zolghadr** is the manager of the Budget Division for the City of Springfield, Illinois. She has served in this capacity since 1991. The division monitors spending for twelve City agencies with a total annual appropriation in excess of \$250 million dollars across 40 funds. The division provides analysis, training, and support to field fiscal personnel as well as ongoing monitoring of external and internal financial trends. The staff provides impact analysis for pending legislation at the federal, state, and local level and works to stay current with major economic trends that may impact local government activities. Ms. Zolghadr has been a presenter at the Illinois Government Finance Officers Association, the Illinois Municipal Treasurers Association, and the Illinois Municipal Clerks Association. She serves as a budget reviewer for Government Finance Officers Association.

## IGFOA Annual Conference Moderator Information

**Tamara Ammann** is the Director of Finance and City Treasurer for the City of Collinsville. She has a Bachelor of Science degree in Accountancy from Southern Illinois University at Edwardsville, has 18 years of experience in governmental accounting, and is a Certified Public Accountant. Tamara is a member of the American Institute of Certified Public Accountants, Illinois Society of CPA's, Government Finance Officers Association, and Illinois Municipal Treasurers Association. She also serves on GFOA's Special Review Committee reviewing Comprehensive Annual Financial Reports (CAFRs) for the Certificate of Achievement for Excellence in Financial Reporting.

**Bob Cafarelli** has been working in the Corporate Trust Industry since 2006 and has been at Zions Bank since its 2014 expansion into the Chicago Market. Bob is primary account manager for many Illinois and Midwest based issuers, including Municipalities, School Districts, Park Districts, Housing Agencies, Hospital Systems, and others. Bob holds a bachelor's degree in finance from Saint Xavier University and completed his studies from the Graham School of Management in 2013. He has over 10 years of banking experience to share with his clients.

**Jamie Cunningham** has over 15 years of experience in government Finance and Customer Service. She holds a master's degree in management from Webster University in St. Louis and B.S. in Marketing from Southern Illinois University Carbondale. Currently, Jamie serves as the Assistant Finance Director for the Village of Lombard. She also served in the United States Air Force as a Financial Services Officer at Scott AFB, IL and Los Angeles AFB, CA.

**Tom Dahl** is the Finance Director for the Village of Roselle since September 2015. Previously, he held the positions of Finance Manager for the City of Geneva, Assistant Finance Director for the Village of Hanover Park and Assistant to the Finance Director for the Village of Addison. Tom also worked for GFOA as a Program Associate reviewing CAFRs and Budgets. Tom is a graduate of NIU with a B.S. in Biology and earned an Advanced Accounting Certificate from College of DuPage. Prior to entering government finance, he worked as a research scientist in the Dental and Medical schools at Northwestern University Chicago campus.

**Krisztina Dommer** is an audit supervisor at Sikich LLP. Prior to joining Sikich, she worked for the national Government Finance Officers Association (GFOA) as a senior program manager. At GFOA, Krisztina managed the administration of the Certificate of Achievement Program for Excellence in Financial Reporting and the Award Program for Small Government Cash Basis Reports.

She performed reviews and generated suggestions for improvement on the Small Government Annual Financial Reports, Comprehensive Annual Financial Reports and Popular Annual Financial Reports of state and local governments in the United States. Krisztina is currently a member of the GFOA's Special Review Committee continuing to perform reviews of Comprehensive Annual Financial Reports. Krisztina has made considerable contributions to the appendices in the 2012 version of the Governmental Accounting, Auditing, and Financial Reporting (GAAFR) publication. She provided technical support to GFOA's thousands of members and has spoken at national training seminars and conferences on governmental accounting and financial reporting. She received a Bachelor of Commerce Degree in Accounting, DePaul University and Graduate of Advanced Government Finance Institute, University of Wisconsin at Madison.

**Kimberly Feeney** is the Treasury Management Sales Advisor Manager at MB Financial Bank. She has been with MB Financial since February 2016; prior to joining the MB Financial team she worked with Bank of America for 13 years in various roles – the last being the Government Treasury Management Sales Manager for the Central Region of the US. Kim worked in Government Accounting/Finance for 10 years holding roles as CFO, Comptroller & Accounting Manager for Cook County Treasurer and the Cook County Forest Preserve District. Kim is a graduate of the University of Illinois; she is a Certified Public Accountant and has a Masters from Loyola University in Business Administration.

**Melissa Gallagher** has more than 23 years of professional experience in the fields of finance, accounting, grants, and management. For the past 17 years, she has worked in accounting and finance for the state, municipal and non-profit sectors. Melissa Gallagher graduated from Michigan State University with a degree in Social Science and Keller Graduate School of Management with a Master of Accounting and Financial Management (MAFM). Melissa serves as a Board Member with the Illinois Government Finance Officers Association and has served as Chairperson of the Technical Accounting Review Committee (TARC) for IGFOA. Melissa is the Finance Director for the City of Rolling Meadows and has been with the City for ten years.

**Tim Gavin, CPA, MBA** is a principal specializing in financial audits of local governmental entities, including cities, villages, park districts, school districts, and special districts. Tim has 10 years of experience in performing audits, accounting services, agreed-upon procedures, and other consulting engagements for over 50 units of local government in Illinois. Tim has served as a presenter

## IGFOA Annual Conference Moderator Information, *continued*

for various educational sessions on topics related to accounting and financial reporting and has been featured in industry publications such as *Accounting Today* and *CPA Practice Advisor*. Having specialized skills in technology applied to accounting and auditing, he's leading the IGFOA's effort to create a Social Media Committee to evaluate the Association's presence on social media.

**James Gibbs** is the Regional Vice-President and Director of RBG with AXA Advisors. He has been doing financial consulting and investing for clients for almost 20 yrs. He has extensively worked with municipalities from areas of compensation to retirement and pension planning. He and his team of advisors handle many of the municipalities, schools, and not-for-profit employers in the Central Illinois area. His firm's focus is on but not limited to investing, insurance, and retirement planning.

**Jim Grammas** has over 20 years of experience in financial services and has served clients for over 18 years at BMO Harris Bank. He has served in various management roles in the bank including Retail Bank Management and as Community Development Relationship Manager. Jim specializes in providing financial advice and customized solutions to local governments to meet their objectives. He works with Municipalities, Public School Districts K-12, Park Districts, and other Government Agencies. Jim is responsible for marketing the bank's broad array of financial products and services to governments in metropolitan Chicago, and serves as his client's primary contact at BMO Harris. He oversees approximately 35 clients. Jim earned a bachelor's degree at Columbia College in Chicago, where he pursued a major in Communications. In addition, Jim has served on the local school board for Elementary School District 71 and is actively involved in several other non-for profit organizations.

**Elizabeth Holleb** is the Finance Director and Treasurer for The City of Lake Forest, Illinois, having joined the City staff in June of 2012. She has her BS in Accounting from Ball State University, where she was a Cum Laude graduate of the Honors College. She is a Certified Public Accountant having successfully completed the examination in 1990. She brings more than 25 years of work experience in municipal finance with employers that include the Government Finance Officers Association, the Village of Northbrook, the Village of Oak Park, and the City of Highland Park. Public and professional contributions have included serving on the Intergovernmental Risk Management Agency's Board of Directors as well as various roles with the Metro Chapter of the Illinois

Government Finance Officers Association. She is a member of the Government Finance Officers Association and the Illinois GFOA. Elizabeth served on the Board of Trustees for the Illinois Metropolitan Investment Fund (IMET) from 2006–2012.

**Andrew Huhn** has over twenty-five years of Government finance experience. He began his career in 1990 working as a Financial Auditor for the State of Arizona Office of the Auditor General. In that position, he worked on financial statement audits for various Arizona local governmental entities. After 4 years with the Auditor General's Office, he then worked for Arizona State University (internal auditor), Maricopa County (Deputy Finance Director) and Maricopa Community College District as their Finance Director. Andrew joined the Town of Normal in 2005 and currently is the Town's Finance Director. He is a licensed Certified Public Accountant and has a Bachelor of Science degree in Business Administration with emphasis in Accounting from the University of Arizona as well as an MBA from the University of Phoenix. He has been an active member of the Illinois and National Government Finance Officers Association.

**Barbara Maziarek** has served as the Village of Palos Park's Finance Director since 2009 and Treasurer since 2011. Prior to accepting this position, she was Finance Director for the Village of Worth, and for the City of Darien. She also served as Treasurer for the Village of Merrionette Park from 1994 until 2014. Barbara Maziarek graduated from DePaul University in Chicago in 1996 with an accounting degree. She has been a member of GFOA and IGFOA since 1999. During her membership with GFOA she has submitted her CAFR reports to GFOA, and has been awarded eleven Certificate of Achievement Awards for Excellence in Financial Reporting. In addition, she has been awarded her fifth Distinguished Budget Presentation Award. Barbara Maziarek currently serves as Secretary of the South Metro Chapter of IGFOA, and is serving her third term in office for the chapter.

**William D. McCarty**, City of Springfield, became Director of Budget and Management (OBM) on May 2, 2011. As Director of OBM, Director McCarty is responsible for overseeing accounting, budgeting, payroll, purchasing, facilities maintenance, and the newly created division of fleet management. From October 2007 through May 2011, Director McCarty was Chief Financial Officer, Bureau of Property Management for the State of Illinois Central Management Services. From April 2005 through April 2009, Director McCarty served as Village President (Mayor) of Williamsville, Illinois. Prior to becoming



## IGFOA Annual Conference Moderator Information, *continued*

Mayor, he spent three years as a Village Trustee in Williamsville. Director McCarty received an undergraduate degree in business administration, Finance Cum Laude from the University of Notre Dame and holds a master's degree in public administration for the University of Illinois–Springfield.

**Michael Mondschain** graduated from Northern Illinois University with an M.P.A. in Public Administration (with an emphasis in Fiscal Administration). While attending N.I.U., Michael served as the Administrative Intern for the City of Elmhurst. He was then hired by the Village of Lombard where he worked for eight years in three increasingly responsible positions culminating as the Assistant Finance Director. Michael currently works for the Village of Wheeling where he has served as Finance Director since 2001. He is also co-chair of the Illinois Government Finance Officers Association's Legislative Committee and serves on the Northwest Municipal Conference's Finance Committee.

**Traci Pleckham** has been the Director of Management Services for the Village of Plainfield since 2006. She previously served over four years as the Finance Director for the United City of Yorkville. Prior to joining the public sector, she spent 10 years with Harris Bank in the not-for-profit custodial, pension, and trust investment services. She received her undergraduate degree in Finance from Illinois State University and her MBA from DePaul University. She currently serves as Chairman for the Southwest Agency for Health Management, a sub-pool of the Inter-governmental Personnel Benefit Cooperative (IPBC) and on the Finance and Operations Committee for IPBC.

**Todd Sholeen** is part of the FirstMerit Government Banking team in Illinois, with over 25 years of banking experience in the government sector. Todd joined FirstMerit in 2012 and is currently a member of the IGFOA where he has served on the planning committee for the annual state conference and is a member of IASBO where he serves on the Cash Management Debt Service Committee. Todd also serves locally as a trustee for the Village of Barrington and volunteers for various nonprofit organizations. Todd graduated from Principia College with a bachelor's degree in English and he received his Masters in Accounting at DePaul University.

**Kevin Wachtel** has more than 18 years of experience in local government management and finance administration. Mr. Wachtel was appointed Finance Director for the Village of Villa Park in 2014 and serves as a Trustee on the Villa Park Fire Pension Board. Prior to working in Villa Park, Mr. Wachtel served in leadership roles in Glen Ellyn, Riverside, and other communities. Kevin earned a B.S. in Political Science in 1998 and Master of Public Administration degree in 2000 from Northern Illinois University. In 2011, Mr. Wachtel was recognized by the GFOA as a Certified Public Finance Officer. Mr. Wachtel has been active in the Illinois Government Finance Officers' Association, where he is currently serving on the Executive Board. He has served on PEC and the South Metro Chapter board from 2005–2009, including President from 2007–2008.

**Susan Wade** is Vice President of Public Funds for First Midwest Bank. She has over 24 years of banking experience almost exclusively in the public funds market. She manages the banking relationships for governmental entities and is a frequent speaker and volunteer at association events. She is a graduate of Eastern Illinois University with a Bachelor's degree in Political Science. Susan is a member of the Illinois Association of School Business Officials, Illinois Government Finance Officer's Association, Will County Governmental League and is appointed to the Financial Advisory Board for the City of Naperville.

**Michael Wolf** has been a CPA for 30 years and has worked in the private sector and public accounting. He has worked for the last eight years as the Finance Director of the Village of Bourbonnais. He has also worked for eight years as the governmental and not for profit auditor for Wadley & Associates and worked ten years for two architectural and design firms in the City of Chicago in capacities beginning as staff accountant up to Chief Financial Officer. Michael has a bachelor's degree in Business Administration from Governor State University. He has served two terms as President of the Institute of Management Accountants Calumet Chapter. He is currently an adjunct instructor for Olivet University, teaching accounting, economics, and finance on the Associate, Undergraduate and Master's level.

**IGFOA Executive Board and Committee Chairs 2015-2016**

<b>President</b>	Rita Kruse Finance Manager, City of Geneva
<b>Vice President</b>	Stephanie Masson Finance Director, City of Rock Island
<b>Treasurer</b>	Christopher Minick Finance Director, City of St. Charles
<b>Secretary</b>	Melissa Gallagher Finance Director, Village of Rolling Meadows
<b>Past President</b>	Scott Anderson Director of Finance, Village of Buffalo Grove
<b>Member at Large</b>	Bill Hannah Finance Director, Village of North Aurora
<b>Member at Large</b>	Kevin Wachtel Finance Director, Village of Villa Park
<b>Member at Large Non-CFO</b>	Andrew Brown Deputy Director of Finance, Village of Buffalo Grove
<b>Associate Representative</b>	Sue Kling Regional Director, Promontory Interfinancial Network, LLC
<b>GFOA State Representative</b>	Mary Dankowski Deputy Village Manager/Finance, Village of Park Forest
<b>South Metro Chapter Representative</b>	Alana Thompson Finance Director, Rich Township
<b>Downstate Chapter Representative</b>	Eric Dubrowski Chief Financial Officer, Peoria County
<b>Chicago Metro Chapter Representative</b>	Jodie Hartman Director of Finance, Village of Lake Zurich
<b>Legislative Committee Co-Chairs</b>	William McCarty II Director–Office of Budget and Management, City of Springfield Michael Mondschain Director of Finance, Village of Wheeling
<b>Membership Committee Co-Chair</b>	Lynn McCammon Finance Director, Village of Winfield Cheryl Scott Assistant Finance Director, Village of River Forest
<b>Nominating Committee Chair</b>	Scott Anderson Director of Finance, Village of Buffalo Grove
<b>Partners' Forum Chair</b>	Sue Kling Regional Director, Promontory Interfinancial Network, LLC
<b>Professional Education Committee Chair</b>	Rachel Musiala Director of Finance, Village of Hoffman Estates
<b>Technical Accounting Review Committee Chair</b>	Christina Coyle Finance Director, Village of Glen Ellyn
<b>Assistants Network Chair</b>	Andrew Brown Deputy Director of Finance, Village of Buffalo Grove
<b>Young Professionals Network Co-Chairs</b>	Brian Hextell PMA Financial Network, Inc. Andrew Kim PMA Securities, Inc.

## IGFOA Chapters and Networks

*Membership in the Illinois GFOA includes affiliation with the chapter of your choice.*

### Assistants Network

IGFOA sponsors an informal network of professional staff that work in local government finance departments, including Assistant Finance Directors, Deputy Finance Directors, Assistant Superintendents of Finance or Business Services, Accounting Managers, Division Managers, Accountants, and Analysts. The Assistants Network is coordinated by the Non-CFO Representative to the Executive Board. The Assistants Network meets throughout the year on a variety of topics relevant to this professional level.

#### Assistants Network Leadership 2016

Andrew Brown, Chairperson;  
Village of Buffalo Grove, Deputy Director of Finance

### Chicago Metro Chapter

The Chicago Metro Chapter has members from Chicago, Cook County, and the collar counties. The Chicago Metro Chapter hosts an annual golf outing and holiday gathering and periodic lunch meetings.

#### Chicago Metro Chapter Leadership 2016

Jodie Hartman, President;  
Village of Lake Zurich, Director of Finance

Bradley Wilson, Immediate Past President;  
City of Wood Dale, Finance Director

Nicole Larson, Vice President;  
Village of Vernon Hills, Assistant Finance Director

Tim Sloth, Vice President;  
Village of Bensenville, Director of Finance

Rob Fredrickson, Treasurer;  
United City of Yorkville, Finance Director

Anthony Fashoda, Secretary;  
Village of Hoffman Estates, Assistant Director of Finance

### 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. This chapter hosts regional luncheon programs, seminars, and conferences.

#### Downstate Illinois Chapter Leadership 2016

Eric Dubrowski, President;  
Peoria County, Chief Financial Officer

Gloria Osborn, Immediate Past President;  
City of Galesburg, Director of Finance & IS

Molly Talkington, Vice President;  
City of Champaign, Financial Services Officer/Budget Manager

Tamara K Ammann, Secretary;  
City of Collinsville, Director of Finance

Sandy Evans, Treasurer;  
City of O'Fallon, Director of Finance

Tracy Kennett, Member at Large Regional Coordinator;  
City of Wood River, Finance Director

Megan Peterson, Regional Coordinator;  
City of East Moline, Finance Director

Curtis Newport, Regional Coordinator;  
Boone County, Treasurer

Carla Paschal, Regional Coordinator;  
Sikich LLP

Debra A Zimmerman, Regional Coordinator;  
Illinois Metropolitan Investment Fund (IMET)

### South Metro Chapter

The South Metro Chapter represents members from Lyons to Joliet to Sauk Village. This chapter holds bi-monthly luncheon programs and seminars. The South Metro Chapter also hosts periodic social events and a holiday gathering.

#### South Metro Chapter Leadership 2016

John Harrington, President;  
Village of Minooka, Finance Director

Alana Thompson, Immediate Past President;  
Rich Township, Finance Director

Arlette Frye, Vice President;  
Village of Lansing, Treasurer

Lisa Heglund, Treasurer;  
City of Lockport, Finance Director

Barb Maziarek, Secretary;  
Village of Palos Park, Finance Director

Mark A Pries, MBA, Chapter Legislative Chair;  
Village of Bradley, Finance Director/Treasurer

Jill Hagan, Chapter Membership Chair;  
MB Financial Bank

Krizstina Dommer, Chapter Social Chair;  
Sikich LLP



## Nominating 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 at the Marriott Bloomington/Normal on September 12, 2016.

IGFOA Nominating Committee Recommended Slate 2016-2017		
Board Position	Recommended Candidate	
President	Stephanie Masson, Finance Director, City of Rock Island	
Vice President	Christopher Minick, Finance Director, City of St. Charles	
Treasurer	William Hannah, Finance Director, Village of North Aurora	First year of a 2-Year Term
Member at Large	Kevin Wachtel, Finance Director, Village of Villa Park	
Member at Large	William McCarty II, Director of Budget and Management, City of Springfield	
Partner Representative	Jessica Govic, Area Senior Vice President – Public Sector, Arthur J. Gallagher & Co.	
Past President	Rita Kruse, Finance Manager, City of Geneva	

Notes about the IGFOA Executive Board Additional Board positions not up for election at 2016 Annual Business Meeting		
Secretary	Melissa Gallagher, Finance Director, City of Rolling Meadows	Elected in 2015 to a two-year term
Member at Large Non-CFO	Andrew Brown, Deputy Director of Finance, Village of Buffalo Grove	Elected in 2015 to a two-year term
GFOA State Representative	Mary Dankowski, Deputy Village Manager/Finance, Village of Park Forest	Designated by IGFOA President
Downstate Chapter Representative	Eric Dubrowski, CMA, Chief Financial Officer, Peoria County	Direct election by Downstate Chapter
South Metro Chapter Representative	Alana (Bates) Thompson, Finance Director, Rich Township	Direct election by South Metro Chapter
Chicago Metro Chapter Representative	Jodie K. Hartman, Director of Finance, Village of Lake Zurich	Direct election by Chicago Metro Chapter

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## IGFOA Get More Green in 2016

The official IGFOA Get More Green in 2016 application is available for download to iOS and Android devices. This app has everything you need to navigate your way through the upcoming event! Install it to have full access to the detailed guide and social functionality.

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