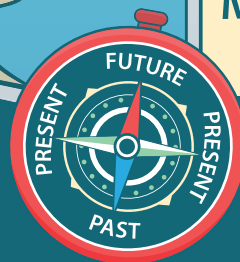


# CONFERENCE PROGRAM GUIDE



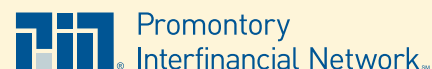
**IGFOA 2017  
ANNUAL  
CONFERENCE  
SEPT. 17-19**

**PEORIA  
CIVIC CENTER  
AND  
MARRIOTT PERE  
MARQUETTE**



**Navigating  
the Path to Leadership**

## 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



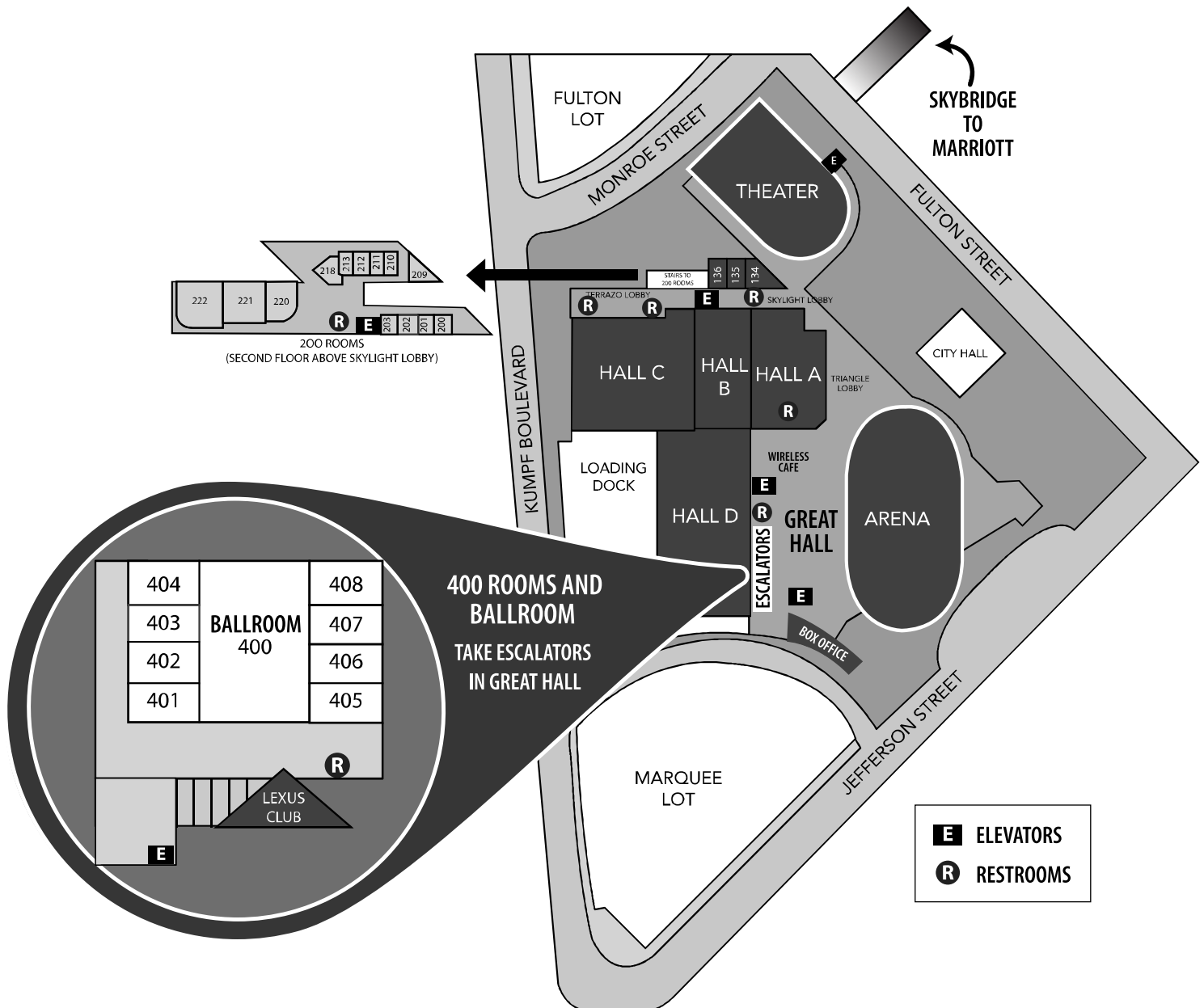
Arthur J. Gallagher & Co.	MB Financial Bank
AXA Advisors	MWM Consulting Group
Azavar Government Solutions	PFM
Baker Tilly Virchow Krause, LLP	PMA Financial Network, Inc.
BMO Harris Bank N.A.	Promontory Interfinancial Network, LLC
Chapman and Cutler LLP	Sawyer Falduto Asset Management, LLC
Federal Home Loan Bank of Chicago	Sikich LLP
Forecast5 Analytics, Inc.	Wintrust Financial
Illinois Metropolitan Investment Fund	Zions Bank
JPMorgan Chase	

## IGFOA Associate Partner Firms

Amalgamated Bank of Chicago	GW & Associates, PC
Asset Control Solutions, Inc.	Huntington National Bank
BAIRD	InfoSend
BKD LLP	Johnson & Bell, Ltd.
BS&A Software	Johnson Controls Inc.
Capital Gains Incorporated	Klein Hall CPAs
CBIZ Valuation Group, LLC	Lauterbach & Amen, LLP
Civic Systems	Miller Cooper & Co., Ltd
CliftonLarsonAllen LLP	Moody's Investors Service
Crowe Horwath LLP	Plante Moran
Ehlers	RSM US LLP
Fifth Third Securities, Inc.	S&P Global Ratings
First Midwest Bank	Sebis Direct Inc.
Foster & Foster	Siemens Industry, Inc.
GovHR USA	Speer Financial, Inc.
GovInvest Inc.	Third Millennium Associates, Inc.
Graystone Consulting	Tyler Technologies, Inc.

## Quick Guide to the Location of IGFOA Conference Sessions

## PEORIA CIVIC CENTER



# Navigating the Path to Leadership



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



## Schedule at a Glance

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

### Sunday, September 17, 2017

8:30 AM–Noon	CPFO Exam, Peoria Marriott Pere Marquette, Illinois Room
10:00 AM	Golf Outing–Coyote Creek Golf Club (Check-in at 9:00 AM)
Noon–6:30 PM	Registration Desk Open–Peoria Civic Center
Noon–6:30 PM	Conference Mobile App Help Desk Open
1:00–2:15 PM	Leadership: Part I–Applied Leadership–Exploring the Dynamics and Lessons of Leading
1:00–2:15 PM	Traditional Finance: When Hackers Go Phishing: Don't Become a Victim
2:30–3:45 PM	Leadership: Part II–Applied Leadership – Exploring the Dynamics and Lessons of Leading
2:30–3:45 PM	Traditional Finance: Long-Range Strategic Forecasting–Linking Your CIP to Your Financial Plan
4:00–5:00 PM	President's Reception for New Members and First Time Attendees
4:00–4:45 PM	Sustaining and Associate Partners' & Exhibitors' Happy Hour
5:00–6:30 PM	Vendor Showcase Welcome Reception
6:30–9:30 PM	Networking Dinner on Your Own <i>or</i> Optional Dinner Alternative: IGFOA Hospitality Suite–Peoria Marriott Pere Marquette

### Monday, September 18, 2017

8:00–8:30 AM	Buffet Breakfast–Peoria Marriott Pere Marquette
8:20–8:30 AM	Welcome–Don Welch, President/CEO, Peoria Area Convention and Visitors Bureau, Peoria Marriott Pere Marquette
8:30–9:45 AM	Keynote Address: Josh Tickell– <i>The Millennial Disruption: Building Bridges in a Multi-Generational Workplace</i> –Peoria Marriott Pere Marquette
10:00 AM–4:00 PM	Registration Desk Open
10:00 AM–5:45 PM	Vendor Showcase Open
10:00–11:15 AM	Leadership: Leadership and Execution–How to Get Things Done
10:00–11:15 AM	Traditional Finance: GASB Update
10:00–11:15 AM	Roundtable: Retirement Planning–Beyond the Finances
11:40 AM–12:30 PM	Leadership: The Top 5 Leadership Qualities Most Valued in a Finance Director
11:40 AM–12:30 PM	Traditional Finance: Everything You Need to Know About Implementing a Successful P-Card Program
11:40 AM–12:30 PM	Roundtable: Navigating a New Financial Reporting Model
12:30–1:45 PM	Luncheon and Annual Business Meeting–Peoria Civic Center
1:50–2:40 PM	Leadership: The Legal Side of Employees' Use of Social Media
1:50–2:40 PM	Traditional Finance: Developing and Evaluating RFPs/RFQs for Bond Team Members
3:15–4:30 PM	General Session: Creating Transparency and Accountability in Your Budget for Collaborative Agreements
4:30–5:45 PM	Vendor Showcase Closing Reception
6:00–10:00 PM	Social Event–Peoria Riverfront Museum

*Between all sessions, breaks are available in the Vendor Showcase in the Peoria Civic Center Ballroom 4th Floor.*

### Tuesday, September 19, 2017

8:00 AM	Breakfast Buffet – Peoria Civic Center
8:30–9:45 AM	Illinois Municipal League 2017 Legislative Update
10:00–10:50 AM	Leadership: Change Management & ERP – How to Successfully Get to Yes
10:00–10:50 AM	Traditional Finance: Overseeing Your Investment Program: Best Practices for Fiduciaries
11:00 AM–12:15 PM	Leadership: Staying Secure When Transforming to a Digital Government
11:00 AM–12:15 PM	Traditional Finance: Putting It All Together: An Investment Simulation Game

*Unless noted otherwise all events are held at the Peoria Civic Center.*

**2017 Annual Conference Summary Schedule**

Day	Start	End	Title	Location/ Meeting Room
Sunday	10:00 AM	2:00 PM	Golf Outing	Coyote Creek Golf Club, 8201 W. Lancaster Rd., Bartonville, IL 61607
Sunday	12:00 PM	6:30 PM	Registration Desk Open	Outside of the Peoria Civic Center Ballroom – Level 4
Sunday	12:00 PM	4:00 PM	Speaker Ready Room	Peoria Civic Center Green Room–Level 4
Sunday	1:00 PM	2:15 PM	Leadership: Part I – Applied Leadership – Exploring the Dynamics and Lessons of Leading	Peoria Civic Center Rooms 403–404
Sunday	1:00 PM	2:15 PM	Traditional Finance: When Hackers Go Phishing: Don't Become a Victim	Peoria Civic Center Rooms 401–402
Sunday	2:30 PM	3:45 PM	Leadership: Part II – Applied Leadership – Exploring the Dynamics and Lessons of Leading	Peoria Civic Center Rooms 403–404
Sunday	2:30 PM	3:45 PM	Traditional Finance: Long-Range Strategic Forecasting – Linking Your CIP to Your Financial Plan	Peoria Civic Center Rooms 401–402
Sunday	2:00 PM	4:00 PM	Exhibit Booth Setup – Vendor Showcase	Peoria Civic Center Ballroom–Level 4
Sunday	4:00 PM	5:00 PM	President's Reception for New Members and First Time Attendees	Lexus Club – Peoria Civic Center Mezzanine Level
Sunday	4:00 PM	4:45 PM	Sustaining and Associate Partners' & Exhibitors' Happy Hour	Peoria Civic Center Ballroom–Level 4
Sunday	5:00 PM	6:30 PM	Vendor Showcase Welcome Reception	Peoria Civic Center Ballroom–Level 4
Sunday	6:30 PM	9:30 PM	Networking Dinner on Your Own or Optional Dinner Alternative: IGFOA Hospitality Suite	Peoria Marriott Pere Marquette–LaSalle Ballroom
Monday	8:00 AM	8:30 AM	Buffet Breakfast	Peoria Marriott Pere Marquette Ballroom
Monday	8:20 AM	8:30 AM	Welcome – Don Welch, President/CEO, Peoria Area Convention and Visitors Bureau	Peoria Marriott Pere Marquette Ballroom
Monday	8:30 AM	9:45 AM	Keynote Address: Josh Tickell – "The Millennial Disruption: Building Bridges in a Multi-Generational Workplace"	Peoria Marriott Pere Marquette Ballroom
Monday	9:30 AM	4:00 PM	Speaker Ready Room Open	Peoria Civic Center Green Room–Level 4
Monday	10:00 AM	4:00 PM	Registration Desk Open	Outside of the Peoria Civic Center Ballroom–Level 4
Monday	10:00 AM	5:45 PM	Vendor Showcase Open	Peoria Civic Center Ballroom–Level 4
Monday	10:00 AM	11:15 AM	Leadership: Leadership and Execution – How to Get Things Done	Peoria Civic Center Rooms 403–404
Monday	10:00 AM	11:15 AM	Traditional Finance: GASB Update	Peoria Civic Center Rooms 401–402
Monday	10:00 AM	11:15 AM	Roundtable: Retirement Planning – Beyond the Finances	Lexus Club – Peoria Civic Center Mezzanine Level
Monday	11:15 AM	11:40 AM	Morning Break	Peoria Civic Center Ballroom – Level 4

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

Day	Start	End	Title	Location/ Meeting Room
Monday	11:40 AM	12:30 PM	Leadership: The Top 5 Leadership Qualities Most Valued in a Finance Director	Peoria Civic Center Rooms 403–404
Monday	11:40 AM	12:30 PM	Traditional Finance: Everything You Need to Know About Implementing a Successful P-Card Program	Peoria Civic Center Rooms 401–402
Monday	11:40 AM	12:30 PM	Roundtable: Navigating a New Financial Reporting Model	Lexus Club – Peoria Civic Center Mezzanine Level
Monday	12:30 PM	1:45 PM	Luncheon and Annual Business Meeting	Peoria Civic Center Rooms 405–408
Monday	1:50 PM	2:40 PM	Leadership: The Legal Side of Employees' Use of Social Media	Peoria Civic Center Rooms 403–404
Monday	1:50 PM	2:40 PM	Traditional Finance: Developing and Evaluating RFPs/RFQs for Bond Team Members	Peoria Civic Center Rooms 401–402
Monday	2:45 PM	3:15 PM	Afternoon Break	Peoria Civic Center Ballroom–Level 4
Monday	3:15 PM	4:30 PM	General Session: Creating Transparency and Accountability in Your Budget for Collaborative Agreements	Peoria Civic Center Rooms 405–408
Monday	4:30 PM	5:45 PM	Vendor Showcase Closing Reception	Peoria Civic Center Ballroom – Level 4
Monday	5:45 PM	7:00 PM	Exhibit Booth Tear Down – Vendor Showcase	Peoria Civic Center Ballroom – Level 4
Monday	6:00 PM	10:00 PM	Social Event – Peoria Riverfront Museum	Peoria Riverfront Museum, 222 SW Washington St, Peoria, IL 61602
Tuesday	7:30 AM	11:00 AM	Speaker Ready Room	Peoria Civic Center Green Room – Level 4
Tuesday	8:00 AM		Buffet Breakfast	Peoria Civic Center Rooms 405–408
Tuesday	8:30 AM	9:45 AM	Illinois Municipal League 2017 Legislative Update	Peoria Civic Center Rooms 405–408
Tuesday	10:00 AM	10:50 AM	Leadership: Change Management & ERP – How to Successfully Get to Yes	Peoria Civic Center Rooms 403–404
Tuesday	10:00 AM	10:50 AM	Traditional Finance: Overseeing Your Investment Program: Best Practices for Fiduciaries	Peoria Civic Center Rooms 401–402
Tuesday	10:50 AM	11:00 AM	Morning Break	Outside Rooms 401–404 – Patio Area Hallway
Tuesday	11:00 AM	12:15 PM	Leadership: Staying Secure When Transforming to a Digital Government	Peoria Civic Center Rooms 403–404
Tuesday	11:00 AM	12:15 PM	Traditional Finance: Putting It All Together: An Investment Simulation Game	Peoria Civic Center Rooms 401–402

*IGFOA reserves the right to modify the agenda and/or speakers. Unless noted otherwise, all events are held at the Peoria Civic Center.*

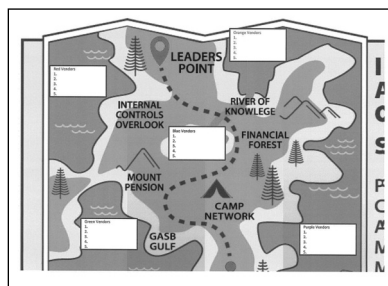
## IGFOA Conference Vendor Showcase

Booth	Vendor	Booth	Vendor
1	Johnson Controls Inc.	31	Moody's Investors Service
2	Multi-Bank Securities, Inc.	32	Ehlers
3	NOVAtime Technology Inc	33	Foster & Foster
4	Tyler Technologies, Inc.	34	Sikich LLP
5	Speer Financial, Inc.	35	Arthur J. Gallagher & Co.
6	S&P Global Ratings	36	AXA Advisors
7	Superion	37	Huntington National Bank
8	Harris Local Government	38	JPMorgan Chase
9	Wells Fargo	39	MWM Consulting Group
10	BAIRD	40	Lauterbach & Amen, LLP
11	CliftonLarsonAllen LLP	41	Capital Gains Incorporated
12	American Deposit Management	42	BKD LLP
13	Baecore Group, Inc.	43	Fifth Third Securities, Inc.
14	Third Millennium Associates, Inc.	44	InfoSend
15	Graystone Consulting	45	GovHR USA
16	Paymentus	46	Mesirow Financial
17	Civic Systems	47	Asset Control Solutions, Inc.
18	Baker Tilly Virchow Krause, LLP	48	Illinois Metropolitan Investment Fund (IMET)
19	PFM	49	Azavar Government Solutions
20	Amalgamated Bank of Chicago	50	RSM US LLP
21	First Midwest Bank	51	Siemens Industry, Inc.
22	PMA Financial Network, Inc.	52	Klein Hall CPAs
23	BS&A Software	53	Plante Moran
24	Zions Bank	54	GovInvest Inc.
25	GW & Associates, PC	55	Miller Cooper & Co., Ltd
26	BMO Harris Bank N.A.	56	Forecast5 Analytics, Inc.
27	Wintrust Financial	57	Federal Home Loan Bank of Chicago
28	Promontory Interfinancial Network, LLC	58	Johnson & Bell, Ltd.
29	Sebis Direct Inc.	59	GMIS
30	MB Financial Bank	61	Invoice Cloud

## Vendor Showcase Treasure Map!

**Public Sector Attendees –  
Find the Colors  
Hidden in the Vendor  
Showcase and  
Complete  
the Treasure Map  
for Prizes!**

page 6



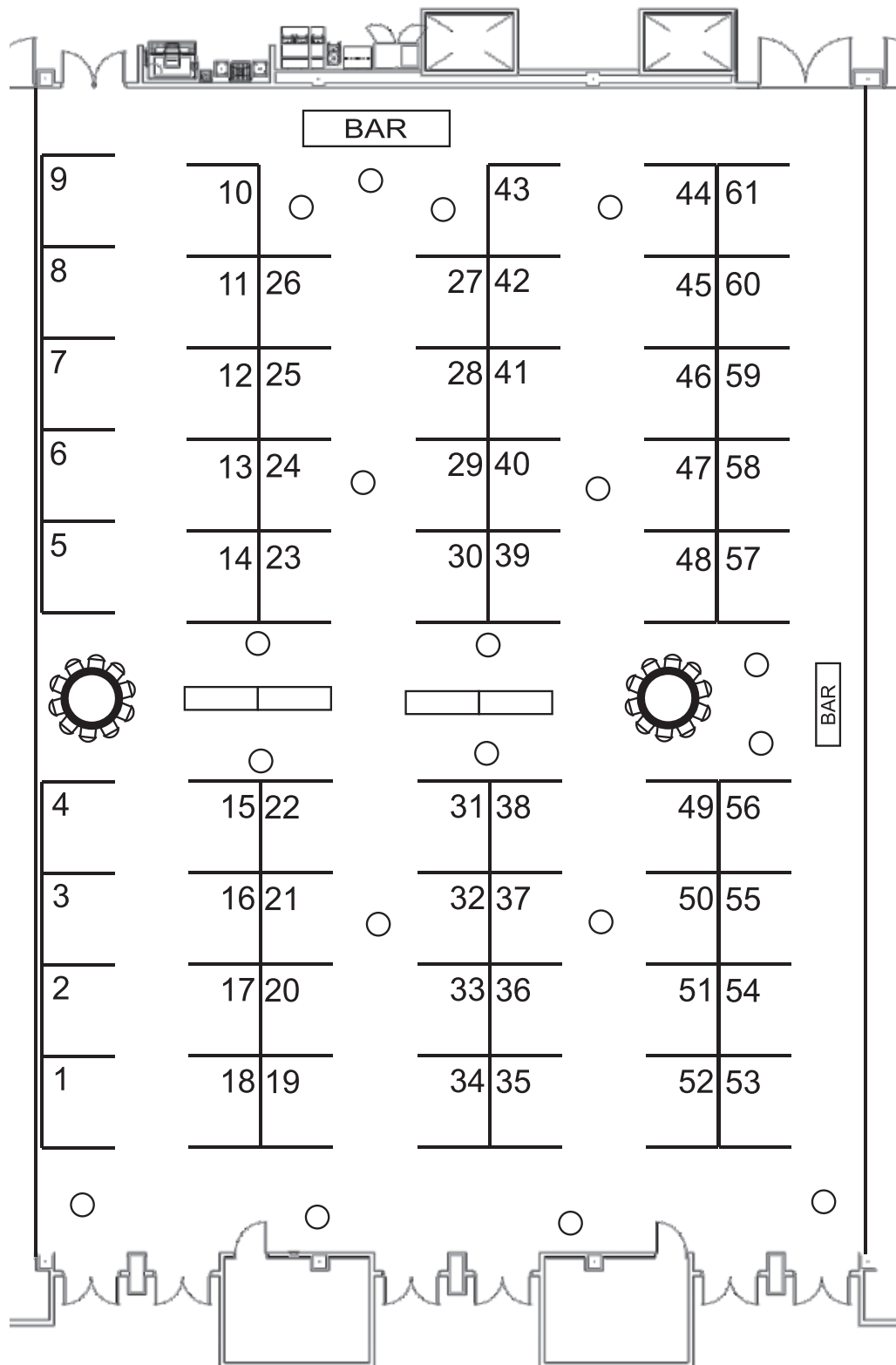
Each Exhibitor in the Vendor Showcase has been assigned one of five colors: Red, Orange, Blue, Green, and Purple.

Collect five signatures of each color by traveling through the Vendor Showcase.

The Vendors' designated color will NOT be displayed so get your compass and begin exploring the booths to find the different colors!

Once 5 signatures of each color are collected, drop the Treasure Map in the designated chest located at the Registration Desk to be entered in raffle drawings for prizes at the Vendor Showcase Closing Reception!

## IGFOA Conference Vendor Showcase



**2017 IGFOA Vendor Showcase**  
**Peoria Civic Center**

## IGFOA Annual Conference Educational Sessions

Sunday, September 17, 2017

### Session 1: 1:00 PM–2:15 PM

#### *Leadership*

#### **APPLIED LEADERSHIP: EXPLORING THE DYNAMICS AND LESSONS OF LEADING – PART I**

Are you ready for an active exploration of the art and science of leadership? During this *2-part session*, participants will examine various leadership styles as well as the broad spectrum of tools, techniques, and theories that are critical to leading an organization. The workshop is an interactive survey of the topic, using video case studies, simulations, and discussion to explore current issues, authors, and developments in leadership theory and practice. Participants will leave the session with helpful frameworks and new insights on how they act and serve as leaders in the organizations they serve.

**Speaker:** Gregory T. Kuhn, PhD, Assistant Director Public Management and Training, NIU Center for Governmental Studies  
**Moderator:** Christopher Minick, Finance Director, City of St. Charles, IL  
**CPE:** About 1.5 hours  
**Field of Study:** Personal Development – Non-Technical  
**Level:** Intermediate

### Session 1: 1:00 PM–2:15 PM

#### *Traditional Finance*

#### **WHEN HACKERS GO PHISHING: DON'T BECOME A VICTIM**

As government budgets continue to shrink, Cyber Attacks continue to rise eating away at the precious funds still available for city services. Information Technology (IT) security experts are waging a losing battle protecting sensitive data within government agencies when many have little or no funding to do so. This session will show why smaller cities are just as vulnerable to cyberattacks like Ransomware as larger cities. It has been estimated that Ransomware will have a negative impact of \$1 Billion on the U.S. economy this year. During this session, you will learn why information security must start at the front lines – with city employees. A brief lapse in judgement by employees clicking on attachments or hyperlinks in an email or on web sites have cost municipalities millions of dollars this past year. In this session, you will learn how to identify phishing techniques that will help prevent a disastrous headline for your agency. You will learn why a security training program is no longer a luxury but a necessity. And finally, you will understand why Finance must take an active role in information security.

**Speaker:** Jim Murphy, Director of Information Technology, City of Quincy, IL  
**Moderator:** Tim Gavin, Partner, Klein Hall CPAs  
**CPE:** About 1.5 hours  
**Field of Study:** Information Technology – Technical  
**Level:** Overview

### Session 2: 2:30 PM–3:45 PM

#### *Leadership*

#### **APPLIED LEADERSHIP: EXPLORING THE DYNAMICS AND LESSONS OF LEADING – PART II**

Are you ready for an active exploration of the art and science of leadership? During this *2-part session*, participants will examine various leadership styles as well as the broad spectrum of tools, techniques, and theories that are critical to leading an organization. The workshop is an interactive survey of the topic, using video case studies, simulations, and discussion to explore current issues, authors, and developments in leadership theory and practice. Participants will leave the session with helpful frameworks and new insights on how they act and serve as leaders in the organizations they serve.

**Speaker:** Gregory T. Kuhn, PhD, Assistant Director Public Management and Training, NIU Center for Governmental Studies  
**Moderator:** Susan Wade, Vice President, Public Fund Banking, First Midwest Bank  
**CPE:** About 1.5 hours  
**Field of Study:** Personal Development – Non-Technical  
**Level:** Intermediate

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

**IGFOA Annual Conference Educational Sessions, *continued*****Sunday, September 17, 2017****Session 2: 2:30 PM–3:45 PM*****Traditional Finance*****LONG-RANGE STRATEGIC FORECASTING – LINKING YOUR CIP TO YOUR FINANCIAL PLAN**

Every government is focused on development, modernization, or replacement of public infrastructure during a multi-year period. The Capital Improvement Program (CIP) arranges these projects based on priorities, cost estimates, and financing considerations. This session will focus on a municipality's use of a 5-year financial planning tool and its link with their long-term CIP for guiding decisions of strategic investment that support community priorities.

**Speakers:** David Torres, Senior Product Manager, Forecast5 Analytics, Inc.  
Julie Ciesla, Assistant Chief Financial Officer, Peoria County, IL

**Moderator:** Elizabeth Hannan, Finance Director, City of Urbana, IL

**CPE:** About 1.5 hours

**Field of Study:** Finance – Technical

**Level:** Intermediate

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**Monday, September 18, 2017****8:30 AM–9:45 AM*****Keynote Address*****THE MILLENNIAL DISRUPTION:*****BUILDING BRIDGES IN A MULTI-GENERATIONAL WORKPLACE***

This session will address the overt and covert conflict that is cropping up in workplaces across America. Largely fueled by the cultural differences of the two largest generations in history, the Baby Boomers and the Millennials, these conflicts mean the difference between an efficient workplace and one that is not. This session will identify the common complaints about Millennials, detail why they are a vastly different group of young people, and look at their expectations, needs, wants, and desires. The big takeaways will be how to build effective communication, workplace protocols, and understanding so that different generations can support each other.

**Speaker:** Josh Tickell

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

**CPE:** About 1.5 hours

**Field of Study:** Personnel/Human Resources – Non-Technical

**Level:** Overview

**Session 1: 10:00 AM–11:15 AM*****Leadership*****LEADERSHIP AND EXECUTION – HOW TO GET THINGS DONE**

What are the keys to maximizing effectiveness and executing strategy? The five important steps for driving execution and achieving successful outcomes using a real-world example will be discussed in detail.

**Speaker:** David M. Limardi, Midwest Regional Director, International City/County Management Association;  
Managing Director of Limardi Consulting, LLC.

**Moderator:** Scott Anderson, Finance Director, Village of Buffalo Grove, IL

**CPE:** About 1.5 hours

**Field of Study:** Business Mgt & Organization – Non-Technical

**Level:** Overview



# **Navigating the Path to Leadership**

**IGFOA Annual Conference Educational Sessions, *continued*****Monday, September 18, 2017****Session 1: 10:00 AM–11:15 AM      *Traditional Finance*  
GASB UPDATE**

The Governmental Accounting Standards Board (GASB) exists to establish accounting and financial reporting standards for state and local governments in the United States. This session will address pronouncements of the GASB that are currently being implemented and issues that are currently being deliberated by the Board. Emphasis will be placed on matters that are likely to impact local governments in Illinois.

**Speakers:** David R. Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board (GASB)  
Brian W. Caputo, Ph.D., CPA, CPFO, Board Member, GASB, Vice President for Administrative Affairs and Chief Financial Officer, College of DuPage

**Moderator:** Frederick G. Lantz, CPA, Partner-in-Charge, Government Services, Sikich LLP

**CPE:** About 1.5 hours

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

**Level:** Intermediate

**Session 1: 10:00 AM – 11:15 AM      *Roundtable*  
RETIREMENT PLANNING – BEYOND THE FINANCES**

A holistic view of retirement planning “No one size fits all.”

**Speaker:** Mary Dankowski, CPA, Retired Finance Director, Certified Retirement Coach

**Moderator:** John Harrington, Finance Director, Village of Minooka, IL

**CPE:** About 1.5 hours

**Field of Study:** Personnel/Human Resources – Non-Technical

**Level:** Overview

**Session 2: 11:40 AM–12:30 PM      *Leadership*  
THE TOP 5 LEADERSHIP QUALITIES MOST VALUED IN A FINANCE DIRECTOR**

What leadership qualities do Administrators value most in a Finance Director? This session will explore the answers to these questions from the perspective of three experienced Administrators. This session will also provide insight on how a Finance Director can best support and complement the role of an Administrator.

**Speakers:** Mark Peterson, City Manager, Town of Normal, IL  
Scott Sorrel, County Administrator, County of Peoria, IL  
Patrick Ulrich, City Manager, City of Peoria, IL

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

**CPE:** About 1.0 hours

**Field of Study:** Personnel/Human Resources – Non-Technical

**Level:** Overview

**Session 2: 11:40 AM–12:30 PM      *Traditional Finance*  
EVERYTHING YOU NEED TO KNOW ABOUT IMPLEMENTING A SUCCESSFUL P-CARD PROGRAM**

The session will focus on how to implement a successful Purchasing Card Program, how it works, and the benefits. Participants will gain an understanding on how to identify eligible transactions for P-Cards, differences between Level I, II, and III data and how that impacts the overall rebate. An overview on P-Card policy, spend controls, fraud liability, and what happens when fraud occurs will also be discussed.

**Speakers:** Kim Feeney, Senior Vice President, Treasury Management Advisory Sales Manager, MB Financial Bank  
Jill Hagen, Senior Vice President, Government Banking Division Manager, MB Financial Bank

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

**CPE:** About 1.0 hours

**Field of Study:** Finance – Technical

**Level:** Overview

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



**IGFOA Annual Conference Educational Sessions, *continued*****Monday, September 18, 2017****Session 2: 11:40 AM–12:30 PM      *Roundtable*  
NAVIGATING A NEW FINANCIAL REPORTING MODEL**

A roundtable discussion regarding GASB preliminary discussion points for a new governmental financial reporting model.

**Speakers:** Susannah M. Baney, CPA, Manager, Baker Tilly Virchow Krause, LLP  
Christina Coyle, CPA, Finance Director, Village of Glen Ellyn, IL  
Krisztina M. Dommer, CPA, Manager, Sikich LLP

**Moderator:** Rita Trainor, Finance Director, Wheaton Park District, IL

**CPE:** About 1.0 hours

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

**Level:** Overview

**Session 3: 1:50 PM–2:40 PM      *Leadership*  
THE LEGAL SIDE OF EMPLOYEES' USE OF SOCIAL MEDIA**

First Facebook. Then Twitter. Now Instagram and Snapchat. What's next?! Government employees are using social media in increasing numbers, both at work and away from the office. This session will discuss how to identify and navigate the legal and policy issues that arise from employee use of social media. Topics include employer monitoring of employee social media use, restricting employee social media use, and how to stay out of court. This session will also discuss the type of social media activities that can subject an employee to discipline and termination, and the importance of adopting a social media policy and employee training.

**Speakers:** Daniel J. Bolin, Attorney, Ancel, Glink, Diamond, Bush, DiCianni & Krafthefer, P.C.,  
Gregory W. Jones, Partner, Ancel, Glink, Diamond, Bush, DiCianni & Krafthefer, P.C.

**Moderator:** Eric Burk, Finance Director, Village of Deerfield, IL

**CPE:** About 1.0 hours

**Field of Study:** Business Law – Technical

**Level:** Overview

**Session 3: 1:50 PM–2:40 PM      *Traditional Finance*  
DEVELOPING AND EVALUATING RFPS/RFQS FOR BOND TEAM MEMBERS**

The session will include a brief refresher on the steps in the bond issuance process and a checklist for a successful bond issue. The session will address when and why issuers may want to use (or not use) the RFP/RFQ process for the selection of bond team members. The speakers will provide suggestions on how to develop and evaluate such RFPS/RFQs.

**Speakers:** Daniel Forbes, President, Speer Financial, Inc.  
Kelly Kost, Esq., Partner, Chapman and Cutler LLP  
Brian LePenske, Vice President, Piper Jaffray & Co.

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

**CPE:** About 1.0 hours

**Field of Study:** Finance – Technical

**Level:** Overview



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 Educational Sessions, *continued*****Monday, September 18, 2017****General Session: 3:15 PM–4:30 PM****CREATING TRANSPARENCY AND ACCOUNTABILITY IN YOUR BUDGET FOR COLLABORATIVE AGREEMENTS**

This session will provide municipalities with guidelines for transparency and accountability in public management networks (PMNs) such as E911 centers, GIS consortia, and countywide mental health networks. The session will present ideas for using municipal budget documents to report contributions to networks, and how the networks can provide the member municipalities with performance data. The discussion concludes with how budgetary decisions regarding the network are made within the member organizations and the network administrative organization itself.

**Speaker:** Kurt M. Thurmaier, Ph.D., Presidential Engagement Professor & Chair, Department of Public Administration, School of Public & Global Affairs, Northern Illinois University  
**Moderator:** Susan Jones, Partner, Miller Cooper & Co., Ltd  
**CPE:** About 1.5 hours  
**Field of Study:** Finance – Technical  
**Level:** Intermediate

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**Tuesday, September 19, 2017****8:30 AM–9:45 PM*****General Session*****2017 IML LEGISLATIVE UPDATE**

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

**Speakers:** Brad Cole, Executive Director, Illinois Municipal League (IML)  
Joe McCoy, Legislative Director, Illinois Municipal League (IML)  
**Moderators:** Michael Mondschain, Director of Finance, Village of Wheeling, IL  
Jason Ashmore, Mayor, City of Sesser, IL  
**CPE:** About 1.5 hours  
**Field of Study:** Finance – Technical  
**Level:** Overview

**Session 1: 10:00 AM–10:50 AM*****Leadership*****CHANGE MANAGEMENT & ERP – HOW TO SUCCESSFULLY GET TO YES**

The Village of Woodridge will share how it successfully managed ERP implementation by recognizing the importance of employee support and how it is not a one-size fits all when gaining that support. This session will provide practical suggestions on how to get “buy-in” at all levels. Then, how to keep a positive attitude through the implementation process from start to finish even while jumping hurdles along the way.

**Speakers:** Nadine Alletto, Finance Director, Village of Woodridge, IL  
Daren Clary, Accountant, Village of Woodridge, IL  
Linda Dalton, Accounting Manager, Village of Woodridge, IL  
**Moderator:** Gary Dube, Senior Account Executive, Tyler Technologies, Inc.  
**CPE:** About 1.0 hours  
**Field of Study:** Management Services – Technical  
**Level:** Overview

**IGFOA Annual Conference Educational Sessions, *continued*****Tuesday, September 19, 2017****Session 1: 10:00 AM–10:50 AM      *Traditional Finance*****OVERSEEING YOUR INVESTMENT PROGRAM: BEST PRACTICES FOR FIDUCIARIES**

Governments officials have a fiduciary responsibility in managing their funds. While different types and sizes of governments require differing levels of complexity in their investment programs, all government officials need to recognize their fiduciary duty. This session will detail the steps needed to develop or refine your investment program in order to effectively set policy, make decisions, and safeguard taxpayer dollars.

**Speakers:** Michelle Binns, Senior Managing Consultant, PFM Asset Management LLC  
 Jason S. Myers, Director of Finance and Personnel, Lombard Park District  
 Jason Palmer, Senior Managing Consultant, PFM Asset Management LLC

**Moderator:** Todd Sholeen, Vice President, Huntington National Bank

**CPE:** About 1.0 hours

**Field of Study:** Finance – Technical

**Level:** Overview

**Session 2: 11:00 AM–12:15 PM      *Leadership*****STAYING SECURE WHEN TRANSFORMING TO A DIGITAL GOVERNMENT**

Governments are experiencing increased pressures to deploy interactive technology solutions to their constituents. While Digital Government initiatives can be exciting they can also increase the risk to organization. Cybersecurity planning, managing IT spending, formalizing technology decision making and overall technology expectation management are key activities the local government finance leader must understand and champion. This session will provide a forum for attendees to discuss their Digital Government concerns, brainstorm solutions, and ask a panel of IT experts for prescriptive solutions.

**Speakers:** F. Alex Brown, Senior Manager, Information Technology Consulting, Plante Moran  
 Mike Riffel, Senior Manager, Management Consulting, Plante Moran  
 Natalie Schwarz, Consulting Manager, Management Consulting, Plante Moran

**Moderator:** Eric Dubrowski, Chief Financial Officer, Peoria County, IL

**CPE:** About 1.5 hours

**Field of Study:** Information Technology – Technical

**Level:** Overview

**Session 2: 11:00 AM–12:15 PM      *Traditional Finance*****PUTTING IT ALL TOGETHER: AN INVESTMENT SIMULATION GAME**

Why do investment professionals make investing sound so complicated? Isn't there a fun way to learn more about investment strategies? This interactive Investment Simulation Game provides participants the opportunity to increase their investment knowledge while playing a game as a team. Participants will work in groups to build their own investment portfolios with a goal of optimizing performance in a variety of market environments. Two scenarios will be run to allow participants to make adjustments and see the outcomes of their investment decisions based on actual past data. This engaging format will offer participants new insights into complex concepts like investment structure and risk management.

**Speakers:** Brian Hextell, Sr. Vice President, Institutional Portfolio Manager, Prudent Man Advisors, Inc.  
 Courtney Soesbe, Vice President, Senior Relationship Officer, PMA Financial Network, Inc.

**Moderator:** Brian Smith, Assistant Finance Director, Village of Wheeling, IL

**CPE:** About 1.5 hours

**Field of Study:** Finance – Technical

**Level:** Overview

**IGFOA Executive Board and Committee Chairs 2016-2017**

<b>President</b>	Stephanie Masson Finance Director, City of Rock Island
<b>Vice President</b>	Christopher Minick Finance Director, City of St. Charles
<b>Treasurer</b>	Bill Hannah Finance Director, Village of North Aurora
<b>Secretary</b>	Melissa Gallagher Finance Director, Village of Rolling Meadows
<b>Past President</b>	Rita Kruse Finance Manager, City of Geneva
<b>Member-at-Large</b>	Kevin Wachtel Finance Director, Village of Villa Park
<b>Member-at-Large</b>	William McCarty II Director – Office of Budget and Management, City of Springfield
<b>Member-at-Large, Non-CFO</b>	Andrew Brown Deputy Director of Finance, Village of Buffalo Grove
<b>Partner Representative</b>	Jessica Govic National Director – Sales & Area Executive Vice President, Arthur J. Gallagher & Co
<b>GFOA State Representative</b>	Mary Dankowski Deputy Village Manager/Finance Director, Village of Park Forest (Retired 7/17)  Rita Kruse Finance Manager, City of Geneva
<b>South Metro Chapter Representative</b>	John Harrington Finance Director, Village of Minooka
<b>Downstate Chapter Representative</b>	Eric Dubrowski Chief Financial Officer, Peoria County
<b>Chicago Metro Chapter Representative</b>	Nicole Larson Director of Finance, Village of Vernon Hills
<b>Legislative Committee Chair</b>	Michael Mondschain Director of Finance, Village of Wheeling
<b>Membership Committee Chair</b>	Lynn McCammon Finance Director, Village of Winfield
<b>Nominating Committee Chair</b>	Rita Kruse Finance Manager, City of Geneva
<b>Partners' Forum Chair</b>	Jessica Govic National Director – Sales & Area Executive Vice President, Arthur J. Gallagher & Co
<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.
<b>Social Media Task Force Chair</b>	Tim Gavin Klein Hall CPAs

## IGFOA Chapters

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

### Chicago Metro Chapter

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

#### Chicago Metro Chapter Leadership 2017

Nicole Larson, President  
Village of Vernon Hills, Finance Director

Jodie Hartman, Immediate Past President  
Director of Finance, Village of Lake Zurich

Rob Fredrickson, Vice President  
United City of Yorkville, Finance Director

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

Anthony Fashoda, Treasurer  
Village of Hoffman Estates, Assistant Finance Director

Amit Thakkar, Secretary  
Village of Bensenville, Director of Finance

### Downstate 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 Chapter Leadership 2017

Eric Dubrowski, President  
Peoria County, Chief Financial Officer

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

Molly Talkington, Vice President  
City of DeKalb, Finance Director

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  
City of Wood River, Finance Director

### Downstate Chapter Leadership *continued*

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

Curtis Newport, Regional Coordinator  
Boone County, Treasurer

Carla Paschal, Regional Coordinator  
Winnebago County, Chief Financial and Budget Officer

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

### 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 2017

Arlette Frye, President  
Village of Lansing, Treasurer

John Harrington, Immediate Past President  
Village of Minooka, Finance Director

Lisa Heglund, Vice President  
City of Lockport, Finance Director

Michael Wolf, Treasurer  
Village of Bourbonnais, Finance Director

Christina Fisher, Secretary  
City of Country Club Hills, Finance Supervisor

David L. Sevier, Member-at-Large  
Village of Richton Park, Finance Director

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

Jill Hagan, Chapter Membership Chair  
MB Financial Bank, SVP, Government  
Banking Division Manager

Krizstina Dommer, Chapter Social Chair  
Sikich LLP, Manager

## 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 Peoria Civic Center.

IGFOA Nominating Committee Recommended Slate 2017–2018	
Board Position	Recommended Candidate
President	Christopher Minick, Finance Director, City of St. Charles
Vice President	Melissa Gallagher, Finance Director, City of Rolling Meadows
Secretary	Kevin Wachtel, Finance Director, Village of Villa Park
Member at Large	William McCarty II, Director of Budget and Management, City of Springfield
Member at Large	John Harrington, Finance Director, Village of Minooka
Partner Representative	Jessica Govic, National Director – Sales & Area Executive Vice President, Arthur J. Gallagher & Co.
Past President	Stephanie Masson, Finance Director, City of Rock Island

Notes about the IGFOA Executive Board Additional Board positions not up for election at 2017 Annual Business Meeting		
Treasurer	William Hannah, Finance Director, Village of North Aurora	Second year of a 2-Year Term
GFOA State Representative	Rita Kruse, Finance Manager, City of Geneva	Designated by IGFOA President
Downstate Chapter Representative	Eric Dubrowski, Chief Financial Officer, Peoria County	Election by Downstate Chapter
South Metro Chapter Representative	Arlette Frye, Treasurer, Village of Lansing	Election by South Metro Chapter
Chicago Metro Chapter Representative	Nicole Larson, Director of Finance, Village of Vernon Hills	Election by Chicago Metro Chapter



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Illinois Government Finance Officers Association

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## IGFOA Navigating the Path 2017

The official IGFOA Navigating the Path 2017 application is available for download to your 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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