



the dispatch

members' update from the Illinois Government Finance Officers Association



Legislative update & resources

Bill McCarty, Director, Office of Budget and Management, City of Springfield, presented the **2019 Legislative Update** at the Downstate Chapter, Quad-Cities Lunch & Learn on December 12, 2019. Bill highlighted the major legislation impacting local governments and discussed resources provided by the Illinois Municipal League. There is much for Illinois local governments to consider and to be aware of as we approach 2020.

Pension investment consolidation

On December 18, 2019, SB 1300 was signed into law as PUBLIC ACT (PA) 101-1610 and consolidates the assets of more than 650 downstate police and firefighter pension funds into two consolidated investment funds. The law goes into effect on January 1, 2020 and contains the major provisions below.

- ▶ The consolidation of all investing, auditing, and actuarial services into each of the two separate funds.
- ▶ The creation of two pension fund boards – one for police officers and one for firefighters.
- ▶ The selection process and duties of the transition boards of trustees and the permanent boards for each pension fund.
- ▶ The election of permanent boards of trustees that will consist of one selected

by IML, three from municipalities, three active employees, and two retirees.

- ▶ The money for each pension fund will be kept in separate sub-accounts and outside the State Treasury, like IMRF.
- ▶ Local funds will retain the right to determine eligibility, benefit payments and disability.
- ▶ Lifts the investment restrictions on downstate public safety pension funds.
- ▶ Reduces training requirements for pension board members.
- ▶ Enhances Tier II benefits as part of the legislation related to COLA, FRE calculation and survivor benefits.

Please refer to IML's fact sheet at <https://legislative.iml.org/file.cfm?key=17899> and IML's resource website <http://iml.org/pensions> for more information on the consolidation of the downstate public safety pension funds.

Online sales tax

On June 28, 2019 legislation was enacted changing the way Retailers Occupation Taxes (ROT aka sales taxes) and Use Taxes are collected. The significant drafting errors in the original legislation were fixed during the fall veto session in order for the law to be implemented as intended. The major provisions of the legislation follow.

- ▶ Applies to remote retailers with sales of at least 200 items or \$100,000 in annual gross receipts on purchases made for use or consumption in Illinois.
- ▶ On January 1, 2020, Marketplace Facilitators will be required to collect Use Tax on Marketplace sales.
- ▶ On January 1, 2021, Marketplace facilitators who meet certain sales thresholds will be required to collect state and locally imposed sales taxes on marketplace sales.
- ▶ Some remote sales will still be origin based if from a seller with an Illinois physical presence.

[Download IML fact sheet.](#)

Cannabis Regulation and Tax Act

The legalization of adult-use is effective on January 1, 2020. The legislation includes the items noted below.

- ▶ 8% of state fees filter down to local governments through the Local Government Distributive Fund (LGDF) for distribution for law enforcement purposes.
- ▶ Sales taxes and local additional ROT will be collected and distributed by the Illinois Department of Revenue (IDOR).

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Legislative update & resources

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- ▶ Additional municipal or county ROT must be passed by April 1 to become effective July 1 and October 1 for January 1 effective date.
- ▶ All passed taxes as of right now will be effective July 1 even if passed by October 1, 2019.

For more information, refer to the IML's adult-use cannabis resources at <https://iml.org/cannabis>. [Download pdf.](#)

Vehicle Trade-in Sales Tax Expansion

Beginning January 1, 2020, trade-in vehicles will have a threshold of \$10,000 for tax off-set purposes rather than full trade-in value.

Parking Facility Tax

Effective January 1, 2020, there is a new tax on parking spaces rented by the day, hour or week. The tax is 6% on daily, hourly and weekly garages and 9% on monthly and annual parking. However, the IDOR is expected to exempt local governments that own and run parking garages and lots through rulemaking with the Joint Committee on Administrative Rules (JCAR).

Public Relations Labor Act (SB 1784)

SB 1784 creates a series of new legal obligations and prohibitions with regard to employee dues, disclosure of personal information, and a union's ability to communicate with employees during work time. Some of the more significant changes to the ILLINOIS PUBLIC LABOR RELATIONS ACT are below.

- ▶ Employee Information to a Union – “At least once a month and upon request,” an employer will have to provide an Excel spreadsheet to an exclusive bargaining representative that includes each employee's job title, worksite location, work telephone number, ID number, personal telephone or cell phone number, date of hire, work email address and home email address. The same information for new employees will have to be provided within 10 days of hire.
- ▶ Disclosure Prohibition – An employer will be prohibited from disclosing to third parties: employee home addresses, dates of birth, personal telephone numbers,

personal email addresses, and other information. Written communications between employees and their union also cannot be disclosed. Such unauthorized disclosures will constitute an unfair labor practice, and possibly expose the employer to a state court lawsuit.

- ▶ Union Access to Current Employees During Paid Time – Employers will have to allow union representatives to meet with employees on the employer's premises in order to investigate and discuss grievances without deduction from the employees' pay or leave banks. Union representatives also must be allowed to meet with employees on the employers' premises during lunch and other non-work breaks to discuss other union-related matters without deduction from the employees' pay or leave banks.
- ▶ Union Meeting with New Employees – Employers must allow unions to meet with all newly hired employees for up to one hour (on paid time) within 10 days of the employee's hire date.
- ▶ Unions' Right to Use Bulletin Boards and Mail Boxes: Employers will also be required to allow unions to distribute collective bargaining materials via the employers' bulletin boards and internal mailbox systems.

IML recommends municipal appointees to the Pension Investment Fund Transition Boards

Congratulations to IGFOA Members Elizabeth Holleb and Jeff Rowitz for their Recommended Appointment as Municipal Transition Board Members for the Police Officers' and Firefighters' and Pension Investment Funds.

The IML Executive Board recommended the municipal appointees to serve on the two transitions Boards of the statewide pension investment funds. On December 18, 2019, IML President Leon Rockingham, Jr. Mayor of North Chicago, formalized those recommendations in letters sent to Governor Pritzker.

Representing the **Firefighters' Pension Investment Fund**:

Steve Chirico, Mayor, City of Naperville
Patrick Nichting, Treasurer, City of Peoria
Jeff Rowitz, Chief Financial Officer, Village of Northbrook

Representing the Illinois Municipal League:

Brad Cole, Executive Director, Illinois Municipal League

Representing the **Police Officers' Pension Investment Fund**:

Elizabeth A. Holleb, Director of Finance, City of Lake Forest
Michael J. Inman, Mayor, City of Macomb
Philip J. Suess, Mayor of Wheaton

Representing the Illinois Municipal League:

Brad Cole, Executive Director, Illinois Municipal League

Dissolution of Coalition for Qualified Plan Status

As a result of the recently approved legislation consolidating the investments of Article 3 Police and Article 4 Firefighter Pension Funds, the Board of Directors for the Coalition for Qualified Plan Status elected to dissolve the Coalition as of December 31, 2019. The remaining account balance from the pension fund contributions will be disbursed as pro-rated refunds to the contributing pension funds. Checks are expected to be issued before the end of the calendar year.

A special thank you to Stan Helgersen for representing IGFOA on the Coalition Board of Directors.

Calendar of Events

Thursday, January 16: [Chicago Metro Chapter Lunch and Learn – Leading an Efficient Audit](#)

11:30 am – 1:00 pm
Arlington Heights Village Hall

Experienced auditors and seasoned professionals on improving your auditing process: representatives from BKD will provide an update on ASU standards effective for 2020, tips for developing an audit timeline, and benefits of an efficient close process. Lunch provided by Panera.

Thursday, January 23: [FREE WEBINAR – Certified Public Finance Officer \(CPFO\) – An Update](#)

Noon–1:00 pm

For IGFOA members, colleagues, and government staff members, answers to frequently asked questions about the Certified Public Finance Officer (CPFO) designation sponsored by the national GFOA in conjunction with Radford University. The webinar will explain what is the CPFO Designation, the examination process, the eligibility requirements, the five exams required by the program, and a new feature to the program, CPFO Testing Online. Also, a discussion of how IGFOA plans to support and assist members in achieving the CPFO designation. Finally, the speakers will explore GFOA's recently announced changes to the CPFO program.

Thursday, January 30: [WEBINAR – Property Tax Basics for Finance Directors](#)

An overview of Illinois Property Tax Assessments, Levies, and Rates for local governments.

Noon–1:15 pm

This webinar will present a discussion on the property tax assessment and collection process, including which documents Finance Directors need to file on an annual basis and when during the levy year those filings need to occur.

There will also be a discussion of what process is used to calculate property tax rates, including how the Illinois tax cap law acts as a limitation on tax rates and extensions for certain non-home rule communities. Further, the methodology for how property is assessed will be discussed, as well as how increases or decreases in assessments impact tax rates. The impact on taxing bodies of both tax increment finance districts and voted bond referenda will also be discussed.

Friday, February 7: [South Metro Chapter Lunch and Learn – Accounting for TIFs Presentation](#)

11:30 am–1:00 pm
Orland Park

This session will discuss the nuances of accounting for tax increment finance (TIF) districts. Learn the basics of accounting for TIF districts; identify what annual reporting requirements exist for TIFs; and understand the issues raised when ending a TIF.

Save the date

Sunday, September 20–22, Springfield:
[IGFOA 2020 Annual Conference](#)

Sunday, September 19–21, 2021, Peoria:
[IGFOA 2021 Annual Conference](#)

Friday, January 24: 11th Annual Illinois Financial Forecast Forum: Private Sector Views that will Impact the Public Sector

Presented by The ILCMA, IGFOA, and NIU/CGS. CEUs will be available.

8:00 am–3:30 pm

Harry Caray's, 70 Yorktown Center Drive, Lombard, IL

[Online registration through NIU.](#)

Questions? Contact ILCMA/CGS/NIU at
Phone: 815-753-5424

Email: info@ilcma.org

2020 Downstate Chapter Conference

Thursday, February 27–28, 2020
Hilton Garden Inn Champaign Urbana

[Downstate Chapter Conference information](#)

Sessions include:

- ▶ **Understanding Behavioral Styles – Building Productive and Impactful Relationships**
- ▶ **Economic and Illinois Market Update**
- ▶ **The Process of Issuing Bonds for an Illinois City or Village**
- ▶ **Overseeing Your Investment Program – Best Practices for Fiduciaries**
- ▶ **Boosting Strategic Thinking – Readiness for the Pace of Change**
- ▶ **Flip, Flop & Fraud – Mystery Fraud Dinner**
- ▶ **Understanding the Impact of Ethics and Fraud in Your Organization**
- ▶ **Legislative Update**

Earn about 12.0 CPE Credits.

Agenda and learning objectives

https://www.igfoa.org/content/documents/2020_downstate_chapter_conference_agenda_and_learning_objectives.pdf

Registration:

Member/Gov. Staff/Partner/Partner Colleague: \$150 Non-Member: \$250

Hotel Information

Hilton Garden Inn Champaign Urbana, 1501 S. Neil Street, Champaign, IL 61820. A block of rooms has been reserved for February 26–28. The special room rate of \$102 plus tax will be available until February 10, 2020. Be sure to mention GROUP CODE: IGFOA2. For reservations call 217-352-9970 and indicate you are with the Downstate IGFOA Conference. To book room in Downstate IGFOA Conference block online: <https://www.hilton.com/en/hotels/cmichgi-hilton-garden-inn-cham->

[TO GET THE MEMBER RATE, REMEMBER TO SIGN IN WITH YOUR USER NAME AND PASSWORD](#)

Volunteer spotlight



**Nikki Larson,
CPA, CPFO, SPHR**

**Finance Director
Village of Glencoe**

**Former President,
Chicago Metro
Chapter**

“For me, the nexus of my IGFOA membership has been volunteering,” explains Nikki Larson. “And the lion’s share of my volunteerism with IGFOA has been serving on the Chicago Metro Chapter Board. That experience gave me so much – I was able to get to know my fellow Board members, have valuable experiences, and take advantage of terrific networking opportunities.”

“As my fellow IGFOA members know, it can take a little practice to get the most out of networking. The Chapter Board keeps that front of mind when planning education events,” she explains.

Getting people out of the office

“It’s so easy to get bogged down and not leave the office,” Nikki continues. “So the goal is to give people a reason to get out for valuable programs. Knowing there’s also good networking with peers can help. We worked, and the Chapter continues to work, to offer programs every quarter, so it becomes a habit for people to attend.”

The Board works as a team

“Working as teams, every Chapter board and its members have a significant impact on the variety of programs offered,” Nikki explains. “In my case, overseeing HR for my municipality inspired a session on how local governments are doing more and more with less, and how finance professionals are being called on to serve in multiple capacities.

“We partnered with a labor law firm. It was gratifying to get questions from the audience validating that people wanted more information and didn’t have a source for it.”

“I’ve been able to work with some great people,” she continues. “A Chapter board is a welcoming, supportive environment. There are so many different personalities and great ideas, and I have learned so much from my fellow Board members. Sure it’s work, but it’s really enjoyable... and you know, it’s not *that* much work.”

Getting a lot done in a short amount of time

Nikki points out that it’s good that volunteer time requirements can vary, since schedules in finance can ebb and flow.

“I mostly give a few hours a month, but sometimes I choose to expand that to a few hours a week,” she says. “Either way, it’s amazing how much someone can get done. For those with limited time, it’s easy to take on things in small increments – you can spend 15 minutes sending an email to solicit meeting attendance, or email ten people to get a speaker.”

Volunteer time is scalable, measurable and predictable

“If someone can lend time, it’s easy for them to know in advance how long different tasks take,” Nikki continues. “Because our fellow members have been doing this for a while, they are adept at predicting how much time to allot for volunteer activities. So you know when you’re getting into it how much time that task will take. Then as you want to do more, you can – it’s absolutely your choice between whether you’ll help for a while handing out CPE forms or choose the other end of the spectrum and plan a Conference session.”

Nikki explains that there’s no shortage of volunteer opportunities: “Every year, the Professional Education Committee publishes a list of seminars, webinars and Lunch & Learns – and every one of those represents an opportunity to volunteer.

How to get started as a speaker

Members who think they’d like to work toward speaking because it’s such good practice for presenting to their boards have found webinars to be a good place to start. “Webinars are a little less intimidating because you don’t see the audience,” Nikki explains. “Serving as a moderator at a webinar or the Annual Conference is another good way to cross the bridge into speaking. And if you choose to speak or contribute to a presentation, you’ll probably find it’s not as daunting as you thought because this association offers such a supportive environment.”

“This is a fantastic association, filled with folks who are extremely talented with so much to offer.”

Getting started as a speaker

Interested in speaking for an IGFOA training event but not sure how to get started? See the tips below.

Serve as a Moderator at an IGFOA webinar – The Professional Education Committee (PEC) Team Leader provides direction and support. This is a great way to begin a journey to professional presentations.

Serve as a session Moderator at the IGFOA Annual Conference – The Conference Planning Team provides a Moderator script and hosts a webinar to review duties and responsibilities.

Serve as a speaker at an IGFOA webinar – The PEC Team Leader will coordinate the details of the webinar and provide the necessary level of support for a speaker to be comfortable with presenting.

Contact PEC Chair Rachel Musiala, Finance Director for the Village of Hoffman Estates for information on available opportunities at rachel.musiala@hoffmanestates.org

Serve as a speaker at a Chapter event – These are generally smaller groups and another great way to begin group-live presentations. Contact information for individual Chapters is at <https://www.igfoa.org/about/chapters-networks>

Volunteer opportunity

The IGFOA Executive Board has directed the Growth & Engagement Network (GEN) to explore methods of engaging and recruiting students into the government finance profession.

As part of this effort, **GEN provides public sector speakers to educational institutions** to share information and experiences on working in government finance. If you are interested in being a part of the speaker list, please contact Kent Flores at floros@chapman.com.

Report: GFOA Leadership Academy

By Elizabeth Hannan, Finance Director, City of Urbana

Recipient of IGFOA's scholarship for the GFOA Leadership Academy

For 2019, national GFOA created a new Leadership Academy, replacing the former Advanced Government Finance Institute. The program was designed to, "provide a forum for participants to learn about broader issues facing governments and an opportunity to enhance their leadership skills to better serve their communities."

Thirty-five participants from all over the United States came together to share this experience.

We represented large and small communities, urban and rural areas, cities, counties, housing authorities, and school districts. While many participants were finance directors or CFOs, other finance professionals were well represented. The class size was perfect – large enough to represent a diversity of background and experience, but small enough so that we could become well acquainted over the week.

Key speakers included:

- Bob O'Neill, former ICMA executive Director, currently a Fellow at the Joseph P. Riley Jr. Center for Livable Communities at the College of Charleston;
- Chris Morrill, Executive Director of GFOA and former City Manager of the City of Roanoke, VA;
- Dr. Alicia Caudill, Executive Vice President For Student Affairs at the College of Charleston;
- Dr. John Nalbandian, Professor Emeritus in the School of Public Affairs and Administration at the University of Kansas;
- Kimberly Nelson, professor of public administration and government at the School of Government at the University of North Carolina, Chapel Hill;
- Joseph P. Riley, Jr., Mayor of the City of Charleston for forty years (retired); and
- Tony Williams, former Mayor of Washington, DC and current Chief Executive Officer of the non-profit Federal City Council

This group spent most of its waking hours together beginning with dinner on Sunday and ending with lunch on Friday. The work

began before we arrived in Charleston with a review of reading materials. Each participant also completed the CliftonStrengths assessment prior to arriving in Charleston.

We opened with Bob O'Neill speaking on 21st century challenges in local government. He emphasized that operating efficiently and effectively is no longer enough. We must learn to work across boundaries, which requires a different set of skills. Current issues are multi-sector, multi-disciplinary, multi-jurisdictional, and intergovernmental. This requires working beyond areas that we can control to areas that we must influence. Trust is essential to working effectively in these areas.

We also spent a great deal of time talking about working in "the gap" with John Nalbandian. The gap is the area between what is politically acceptable and operationally sustainable. Politics and administration are fundamentally different ways of thinking. This is no longer entirely the City Manager or Administrator's territory. CFOs and other department heads are increasingly called upon to work in the gap. A key to doing this successfully is to build bridges without becoming politically aligned or administratively compromised. This requires building trust.

To work in the gap effectively, we must understand the political mindset. Politics involves making choices among conflicting values. While we, as finance professionals, tend to think of efficiency first, we must understand that efficiency is only part of what the City Council considers in making decisions. Fundamental democratic values that are weighed in City Council decisions include representation and participation, efficiency and professionalism, social equity, and individual rights.

Some of the skills that separate staff who excel at working in the gap include comfort with uncertainty, willingness to compromise, ability to develop trust, ability to look at issues through both administrative and political lenses, and ability to separate recommendations from Council desires.

Kimberly Nelson spoke on advancing innovation. She identified seven factors that drive innovation. Leadership and communi-

cation catalyze innovation; resource allocation, structure and process, and capacity enable innovation; and the policy environment and learning agenda sustain innovation. While most of us are too resource-challenged to create an entire team or organization dedicated to innovation, there are small things we can do to encourage innovation – we can question assumptions, be open to change, spend time with staff in other departments, and let people know that it is okay to sometimes fail. Innovation can be embedded into the organizational culture through shared values, purpose, and rules of engagement.

Of course, no leadership course would be complete without some significant discussion about ethics. GFOA president Chris Morrill walked us through the new GFOA Code of Ethics, and we had some robust discussion about ethics case studies with Bob O'Neill.

Throughout the week, we considered how our strengths (from the CliftonStrengths finder mentioned above) affect how we deal with various situations and problems. We learned that we should play to our strengths, rather than focus only on improving areas of weakness. As Dr. Nalbandian said, "If you want the respect of others, deploy your talents in ways that others value."

I left the Leadership Academy recharged and ready to take on new challenges. Each of us made a commitment to enhance our personal leadership skills and our organization's leadership capacity. We also committed to following up with a partner or partners from our class.

If you would like to participate in the next GFOA Leadership Academy, block off your calendar for October 18–23, 2020.



Elizabeth Hannan

**Finance Director
City of Urbana**

Elizabeth Hannan has served as Finance Director for the City of Urbana since 2014. She began her career in public service as an intern at the City of Cincinnati when she was in graduate school. She earned her bachelor's degree in Economics and completed her coursework for a master's degree in Economics from the University of Cincinnati. Elizabeth can be contacted at eahannan@urbanaininois.us.

IGFOA Committees are working to serve the needs of members!

Professional Education Committee

[Rachel Musiala](#), Chair; Finance Director, Village of Hoffman Estates
Tricia Dubiel, Executive Board Liaison; Superintendent of Business & Finance, Bolingbrook Park District

The IGFOA Professional Education Committee (PEC) has been busy planning training on topics relevant to all the experience levels of IGFOA members, government staff members, partners, and partner colleagues. PEC has planned for in-person sessions as well as a variety of webinars. PEC's goal is to help all IGFOA members build upon their core, foundational government finance knowledge with this training.

Below is the PEC 2020 training calendar. *Please note that Basic Governmental Accounting will be presented in Springfield on April 30th and Advanced Governmental Accounting will be presented on July 16.* Some of the dates are tentative so be sure to refer to the [IGFOA website](#) and weekly emails for current information.

2020 IGFOA Training Plan

Date	Title	Type (Location)
January 23	CPFO Webinar	Webinar
January 30	Property Tax Basics for Finance Directors	Webinar
March 12	Back-to-Basics on Debt	Webinar
March 19	Back-to-Basics on Purchasing	Webinar
April 16	Illinois Public Pension Institute	In-person (NIU Naperville)
April 28	Government Finance Professionals Institute	In-person (NIU Naperville)
April 30	Basic Governmental Accounting Seminar	In-person (Springfield)
May 6	Internal Controls Seminar	In-person (NIU Naperville)
May 28	Payroll Webinar – Military Pay	Webinar
June 4	CAFR Reporting Deficiencies	Webinar
June 25	Utility Billing Seminar	In-person (NIU Naperville)
July 16	Advanced Governmental Accounting Seminar	In-person (NIU Naperville)
July 30	The Importance of Cash Reserves	Webinar
September 20-22	IGFOA Annual Conference	In-person (Springfield)
September 29	Customer Service Success Stories	Webinar
October 15	Debt Institute	In-person (NIU Naperville)
October 22	Payroll Seminar	In-person (NIU Naperville)
November 19	Back-to-Basics on Investments	Webinar

Legislative Committee

[Bill McCarty](#), Chair and Executive Board Liaison; Director, Office of Budget and Management, City of Springfield

The Legislative Committee most recently was busy monitoring and reporting on developments that occurred during the Illinois General Assembly veto session. In particular we are looking to better understand the pension investment consolidation bill, recreational cannabis law updates, and IDOR's effort to exempt local governments from the parking facility tax that is scheduled to go into effect on January 1.

After the holidays, we'll be turning our attention to the upcoming Spring session of the Illinois General Assembly. We look forward to keeping IGFOA membership informed on what is happening in Springfield and how it might impact their organizations.

Technical Accounting Review Committee (TARC)

[Christina Coyle](#), Chair, Finance Director, Village of Glen Ellyn
Elizabeth Holleb, Executive Board Liaison, Finance Director, Village of Lake Forest

In the third quarter, TARC issued a [white paper](#) (https://www.igfoa.org/content/documents/FINAL_GASB_84_Police_and_Fire_Pension_Funds_Whitepaper.pdf) on the recommended application of GASB STATEMENT NO. 84, FIDUCIARY ACTIVITIES, on the Downstate Police and Fire Pension Funds. This white paper was the culmination of over a year of research and exchange with GASB. TARC was very grateful to have the collaboration of the Illinois CPA Society on this whitepaper. TARC also continues to review and respond to GASB exposure drafts where applicable.

Looking forward to 2020, TARC expects to see an Exposure Draft from GASB on the financial reporting model and another Invitation to Comment/Preliminary Views document on revenue and expense recognition. GASB's technical plan for the first third of 2020 can be found on its [website](#).

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IGFOA Committees *continued from previous page*

Growth and Engagement Network (GEN)

[Kevin Wachtel](#), Interim Chair and Executive Board Liaison; Finance Director, Village of Villa Park

The Growth and Engagement Network Committee (GEN) was formed through the combination of two prior networks within IGFOA. GEN is a committee that continues to evolve in response to IGFOA Strategic Plan initiatives. A major part of GEN is promoting the IGFOA to its current members, individuals outside of the organization, and future government finance professionals. The committee also provides lunch and learn events, engages colleges and universities, and works closely with the Executive Board to fulfill the IGFOA's strategic plan initiatives.

GEN is working with Northern Illinois University to facilitate a GFOA student chapter, which would be just the 5th in the country. This collaboration, including the IGFOA Executive Board and national GFOA, allows all organizations involved to work together to attract more students into the government finance profession. Once accomplished, GEN looks forward to assisting more colleges and universities throughout Illinois develop their own GFOA student chapters.

Through the help of a sub-committee under GEN working closely with the IGFOA Executive Director, communities are able to post internship opportunities on the IGFOA Jobline. GEN will continue to work with its member communities to communicate internship opportunities with students interested in a government finance path.

The Committee works with speakers to develop engaging lunch and learn event topics, from congressmen to millennials. These great partnerships provide high quality learning opportunities over the lunch hour, with opportunities for members all over the state to attend. The events also set aside time for members and attendees to network at the conclusion of the session.

GEN will continue to evolve to serve the needs of the IGFOA and its members. Committee members hope to see you at events in the coming year!

Membership Committee

[Linda Dalton](#), Chair; Accounting Manager, Village of Woodridge
John Harrington, Executive Board Liaison; Finance Director, Village of Minooka

The Membership Committee focuses on recruiting new IGFOA members while retaining our current valued members. The Committee is made up of 12 IGFOA members representing Chicago Metro, South Metro and Downstate Chapters. Currently, the Committee is working with the Growth & Engagement Network (GEN) to support a new student chapter in Illinois. These students are OUR FUTURE.

The Committee would like to thank each of you for making IGFOA what we are today. Your membership is valued. Without YOU, IGFOA would not exist. We appreciate the expertise you share through volunteering opportunities, mentoring, responding to the on-line Knowledge Exchange or just networking. Professional development opportunities are endless, which makes IGFOA priceless.

Please note: On December 16, IGFOA posted its 2020 membership renewals in the online profiles of the primary members. Please be sure to log into your IGFOA profile and renew ASAP. We need YOU.

Meanwhile, if you are interested in volunteering on the Membership Committee, please contact Linda Dalton, Chairperson, at ldalton@vil.woodridge.il.us.

IGFOA Website Redesign Task Force

[Elizabeth Holleb](#), Chair; Finance Director, City of Lake Forest

The IGFOA Web Site Redesign Task Force was created in response to the need to update the appearance of the IGFOA website and improve both functionality and ease of navigation. The Task Force began meeting in October and is well on its way to achieving these goals. Please feel free to contact any of the Task Force members with comments or suggestions regarding the appearance or enhancements for the IGFOA website. Members of the Task Force are [Elizabeth Holleb](#), [Bill Hannah](#), [Melissa Gallagher](#), [John Harrington](#), [Nick Mostardo](#), and [Natalie Schwartz](#).

2019 IGFOA Associate Partners

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

IGFOA 2020 membership dues renewal

New this year! Fee for additional Sustaining Partner memberships reduced to \$175 from \$200.

Facilitating an efficient renewal process for all members

IGFOA posted 2020 membership dues renewals to the profile of primary members on December 16.

Dues for 2020 are unchanged from 2016 and cover the calendar year January through December.

On-line renewal is efficient and easy but must be completed by the primary member.

Please note: The membership renewal process will proceed most efficiently if primary members review and update their list of members and related profiles before paying.

To do so, primary members should sign-in to their profiles on the IGFOA website with their User-ID (email address) and Password, then click on the link "Renew your membership" at the top right of the page.

Public Sector Membership dues

Public sector membership dues include one primary membership at a base rate determined by population as of the most recent US Government census. Once a government renews its primary membership at the base rate, additional IGFOA memberships can be added for staff members at \$100 per membership.

Population	Rate
Under 5,000	\$150
5,000 – 14,999	\$200
15,000 – 24,999	\$250
25,000 – 74,999	\$300
75,000 – 124,999	\$400
125,000+	\$500

Public sector members with questions on renewing dues can contact the Membership Committee. A list of Membership Committee members can be found at

<http://www.igfoa.org/about/committees/5/membership-committee>

Voluntarily left the workforce

Are you currently unemployed as a result of being in-between positions or meeting family or other personal responsibilities? If so, consider renewing your IGFOA membership under the category "Temporarily Left the Workforce". This category is intended to help government finance professionals in transition to maintain their IGFOA membership. Information on this category of membership can be found at <https://www.igfoa.org/membership/temporarily-left-workforce-membership>

Retired Membership

Retired Membership may be held in the IGFOA by an individual who meets all the retired membership requirements.

Policy Criteria for Retired Membership:
Individual was a member of IGFOA in good standing prior to retirement and is not currently working more than 500 hours per calendar year.

Current retiree members must certify each year that they meet the membership requirements by completing the Retiree Status Form and returning it to IGFOA.
The form and additional information on the Retired Membership category can be found at <https://www.igfoa.org/membership/retired-membership>.

Retired members with questions on renewing dues or completing the Retiree Status Form can contact the Membership Committee directly with questions. A list of Membership Committee members is at <http://www.igfoa.org/about/committees/5/membership-committee>

Sustaining and Associate Partner membership dues

Membership dues for Sustaining and Associate Partner members vary by the level of membership.

- Sustaining Partner dues remain at \$4,800 for two members – the primary member and one additional member. The fee for additional memberships beyond the two included was reduced in 2020 to \$175 per membership.
- Associate Partner dues remain at \$2,700 for the primary member. Additional memberships are available for \$225 per member.

Sustaining and Associate Partners with questions on renewing dues can contact a member of the Partners' Forum. A list of Partners' Forum members is in the box below or at <http://www.igfoa.org/about/committees/2/partners-forum>

Individual Member dues

The Individual Member category is for employed public sector members eligible for the Dues Reduction program <https://www.igfoa.org/membership/public-sector-membership> or for vendors who choose not to join the Partner Program. Individual Member dues remain at \$600 for one primary membership.

2020 Partners' Forum



2020 Partners' Forum members are (front row, left to right) Sue Kling, Chair and Partner Representative to the Executive Board; Aimee Briles; Ethan Salsinger; (back row, left to right) Bill Sarb; Erik Stolz; Michelle Binns; IGFOA President Bill Hannah. Not pictured: Bob Cafarelli

The Partners' Forum met on December 17, 2019 to determine initiatives and set goals for 2020. Below is a list of the major initiatives and goals.

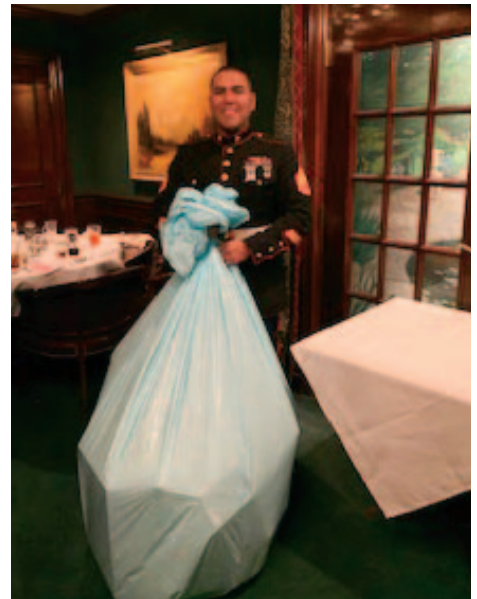
- Confirm Partner Appreciation/Volunteer Recognition date of May 7, 2020 (Be sure to mark your calendars).
- Improve outreach communication with Partners, especially regarding IGFOA's policy to support compliance with the Gift Ban Act.
- Formalize current Partner practices by recommending policies to the Executive Board Policy Manual Task Force.
- Approve the maximum number of Sustaining Partners and Associate Partners in IGFOA Partners' Program as 24 and 50, respectively.

Watch for more information from your Partners' Forum outreach contact.

IGFOA 2019 Chapter holiday highlights!

Downstate Chapter, Central Region

The Downstate Chapter, Central Region celebrated December 5 at Jim's Steakhouse in Peoria. The Chapter sponsored Toys for Tots. Marine Staff Sergeant Frank Tartsah, Coordinator for the Peoria Toys for Tots Program talked about the overall program and how Toys for Tots has collected and distributed toys to children up to age 12 and in some communities up to age 16. Make donations [here](#).



Downstate Chapter, Quad Cities Region

The Downstate Chapter, Quad Cities Region hosted its holiday event at Bass Street Chophouse in Moline. IGFOA Treasurer & Legislative Committee Chair Bill McCarty, Director, Office of Budget and Management, City of Springfield, provided a Legislative Update.



Holiday highlights *continued*

Chicago Metro Chapter

On December 6, the Chicago Metro Chapter hosted its holiday party at Harry Caray's in the Westin Hotel, Lombard. The Chapter sponsored Young Hearts for Life as its charity. Young Hearts for Life offers FREE electrocardiograms (ECG) to students to detect conditions which could lead to sudden cardiac death. Dr. Joseph Marek and Kathleen Marek discussed the YH4L program. You can make donations to YH4L [here](#).



Downstate Chapter, Joint Southern/Southwestern Regions

The Downstate Chapter Southern and Southwestern Regions held a joint holiday event at Dewy's Pizza in O'Fallon. Stephen Adams, PMA Securities presented *Making the Most of your Debt Management Policy*.

Holiday highlights *continued*

South Metro Chapter

The South Metro Chapter held its holiday event at Balagio Ristorante – Homewood. The Chapter's sponsored charity was South Suburban PADS. South Suburban PADS is an emergency shelter network that provides shelter every night of the week to men, women, and children. They provide three meals each day, including a sack lunch to take when guests depart the shelter in the mornings. They also provide case management for permanent housing, health and wellness, employment, and education. You can donate to SSPADS [here](#).



Downstate Chapter, Rock River Region

The Downstate Chapter, Rock River Region celebrated December 17 at the Tavern on Clark with a presentation from Jason Franken, Foster & Foster, and Dalena Welkome, Robert W. Baird & Co. with *An Overview of Pension Obligation Bonds*.





IGFOA PARTNERS

THANKS TO SUSTAINING PARTNERS FOR SUPPORTING IGFOA

