

# IGFOA SOUTH METRO CHAPTER PROFESSIONAL DEVELOPMENT SEMINAR

April 20, 2023

Village of Frankfort, 432 W. Nebraska, Frankfort, IL 60423

## AGENDA

**8:00 - 8:25 AM**                      **CHECK-IN AND NETWORKING**

**8:25 - 8:30 AM**                      **WELCOME AND INTRODUCTIONS**

*Betty Zigras, Finance Director, Village of Olympia Fields and  
President, IGFOA South Metro Chapter*

*Jenni Booth, Finance Director, Village of Frankfort and  
Vice President, IGFOA South Metro Chapter*

**8:30 - 9:20 AM**                      **UNDERSTANDING MOODY'S CREDIT RATING PROCESS  
AND NEW CITIES AND COUNTIES METHODOLOGY**

*Speakers: Coley Anderson, Vice President, Moody's Investors Service  
Rachel Cortez, Assistant Managing Director, Moody's Investors Service*

Moody's Investors Service experts will discuss the recent changes in Moody's rating methodology and how it will impact the ratings of local units of government in Illinois. They will also review the rating timeline and process.

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

- Understand Moody's rating process from start to finish; and
- Learn how Moody's evaluates credits under the new Cities and Counties Methodology.

**CPE:** About 1.0 hours

**Field of Study:** Finance – Technical

**Level:** Update

**9:20 - 9:30 AM**                      **BREAK**

**9:30 - 10:45 AM**                      **ACHIEVING A HEALTHY WORK LIFE BALANCE**

*Speaker: Loren Sanders, Professional Synergist, Fortune 4 Learning  
Leader, Executive Coach and Empathy Coach*

Participants will take an internal look at their definition of work life balance and think and self-reflect through information and activities. They will take away tips and tricks to get a better handle on how well they are doing as well as strategies to get better at balance.

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

- Identify the personal perceptions that impact work life balance;
- Explore work life balance and how it applies to their personal experience;
- Determine accountability triggers that help and hurt attempts at work life balance; and
- Gain strategies for managing work life balance.

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

**10:45 - 11:00 AM**      **BREAK**

**11:00 - 11:50 AM**      **MITIGATING THE COST OF MEDICAL INSURANCE AND  
MAXIMIZING INVESTMENT INCOME IN YOUR  
ORGANIZATION**

*Speakers: David Cook, Executive Director, IPBC  
Michelle Binns, Director, PFM Asset Management*

Join two knowledgeable and experienced government finance professionals as they share practical information on how to mitigate the costs of medical insurance...your #2 operating expense and explore the current investment markets, including reviewing key strategies to help maximize potential investment income in this new rate environment.

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

- Understand the options for helping to keep medical costs lower and to budget for future years; and
- Learn how to make the most of higher interest rates to maximize investment income.

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

**11:50 AM - 12:40 PM**      **HR FUNDAMENTALS OF FINANCE FOLKS**

*Speakers: Bill Hannah, Director of Finance, City of St. Charles and  
IGFOA Past President  
Jennifer McMahon, SPHR, Director of Human Resources, City of St.  
Charles*

Human Resources responsibilities can fall into different departments depending on the size and structure of the municipalities. They could be under the Manager's office or a separate HR department. Many times, however, the Finance Director and Department is charged with ensuring that many of these responsibilities are completed. This session aims to arm finance staff with knowledge to administer basic HR functions to remain compliant, to instill positive labor relations, and to deal with personnel issues effectively.

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

- Identify compliance requirements (e.g. FMLA, Workers Compensation, employment postings, harassment, ACA, etc.);
- Gain an understanding of basic labor relations; and
- Learn the basics of an internal employee investigation.

**CPE:** About 1.0 hours **Field of Study:** Personnel/Human Resources – Non-Technical **Level:** Update

**12:40 – 12:45 PM**      **CLOSING REMARKS**

*Jenni Booth, Finance Director, Village of Frankfort and Vice President,  
IGFOA South Metro Chapter*

**12:45 - 1:45 PM**      **NETWORKING LUNCH**