

ILLINOIS ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
53RD ILLINOIS ASBO ANNUAL CONFERENCE & EXHIBITION
PHEASANT RUN RESORT, ST. CHARLES, ILLINOIS
MAY 12-14, 2004
SESSION OFFERINGS

Tuesday, 5/4/2004

7:30 am - 4:30 pm

**Professional Development (HRM) Committee - The 21 Irrefutable Laws of Leadership
(an approved required strand for Illinois Administrators' Academy credit)**

Salon V (140)

The 21 Irrefutable Laws of Leadership is a powerful definitive statement of the timeless laws a leader must follow to be a great leader at the school, the school district, or wherever a school administrator is called on to lead. The seminar will provide an opportunity for school administrators to view the video tape of each law showing the successes and failures of others. School administrators will then review each law and its application to the school and the school district.

Speaker(s): Calvin C. Jackson, Legislative & Professional Development Consultant, Illinois ASBO, Fairbury, IL

Tuesday, 5/4/2004

8:00 am - 12:00 pm

Facility Designation Program (FM) Committee - Introduction to Facilities Management

Salon VI (140)

This program satisfies a requirement for the Educational Facilities Management Designation Program. Expectations will be explained - regulations, fees, sign-in, recording procedures and philosophy of the Educational Facilities Management Designation Program. Syllabus overview - discuss entire program offerings, handout related materials (binders) and information on final documents, recognition procedures and title of DPFM (Designation Professional Facilities Manager). In addition, the following topics will be presented: 1) The Role of the Facility Manager in an Educational Facility, 2) The Facilities Impact on the Learning/Working Environment, 3) Laws & Codes, 4) Developing Your Facility Manager Network and 5) Assignment, Summation & Evaluation.

*Speaker(s): Michael Arnold, Dir./Buildings & Grounds, Sunset Ridge SD 29, Northfield, IL
Joseph Bettuzzi, Dir./Buildings & Grounds, Culver School 71, Niles, IL
James H. Caldwell, Dir./Buildings & Grounds, Lincolnwood SD 74, Lincolnwood, IL
James A. Wuerffel, Dir./Buildings & Grounds, Park Ridge Niles SD 64, Park Ridge, IL*

Tuesday, 5/4/2004

8:00 am - 12:00 pm

Budgeting & Financial Planning (FRM) Committee - How to Build Five Year Financial Plan

Salon II (300)

School districts across the country are searching for ways to 'stretch' limited revenue sources and seeking ways by which to contain costs.

- . Is an Educational Tax referendum being considered and how does it affect General State Aid formula?
- . What is the cost of "Tax-Cap" on your School District?
- . What is the cost of step increase on your salary scatter gram and how to calculate it?
- . How to calculate and incorporate ERO, Health and retirement benefit costs in long-term financial

plan?

. What happens when the State appoints "A SCHOOL FINANCE AUTHORITY"?

These are just a few questions that could be answered by effective planning tool. For long-term financial success, nothing is more valuable than a well-documented, well-constructed financial plan. The benefits are nearly immeasurable.

*Speaker(s): Vladimir Dragosavljevic, Vice President, PMA Financial Network, Inc., Warrenville, IL
George M. Lingel, Marketing Director, School Bus Purchasing Coop., Rockford, IL
Donald E. Weber, V.P./Financial Advisory Services, PMA Financial Network, Inc.,
Warrenville, IL*

Tuesday, 5/4/2004

4:00 pm - 8:00 pm

- Exhibitors Setting Up & Registration Desk is Open

Exhibit Hall

Tuesday, 5/4/2004

5:30 pm -

- Post Golf Hospitality & Dinner (open to members & conference registrants)

Wednesday, 5/5/2004

7:00 am - 8:00 am

- Board of Directors Breakfast Meeting

Salon V (140)

Wednesday, 5/5/2004

7:00 am - 9:00 am

- Welcome Reception

Atrium

Wednesday, 5/5/2004

7:00 am -

- Staff Details: Staff Schedule Wednesday

Wednesday, 5/5/2004

7:00 am - 11:30 am

- Exhibitors Setting Up

Exhibit Hall

Wednesday, 5/5/2004

8:00 am - 8:30 am

- Program for New Members

Salon VI (140)

Wednesday, 5/5/2004

9:00 am - 10:45 am

- Opening General Session

Salons I, III, IV

Mac is the founder and former CEO of Successories, the leader in creating products for employee motivation and recognition. He and Successories have been featured on the ABC Nightly News with Peter Jennings, and in Inc. Magazine, Sales and Marketing Management, Professional Speakers Magazine, The Washington Post, Los Angeles Times and The Chicago Tribune. His 30 years of blood, sweat and tears as an entrepreneur have taught him a lot about business and about life that he loves sharing with others. In addition, he is the author of two books that have sold over 100,000 copies: Companies Don't Succeed...People Do and Motivating Yourself.

Wednesday, 5/5/2004

9:00 am - 9:50 am

- Exhibit Hall Presentation: "Winning Strategies for Successful Exhibiting"

Exhibit Hall

Darrell Muehler, Professional Sales Trainer & Associate of Incomm Center for Research & Sales Training, Chicago, will provide you with tips for engaging visitors and attracting them across the carpetline, selling to groups, best tips for making a positive impression and successful closing techniques. He will also be available to provide input on how to make your exhibit booth more effective.

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Technology for School Finance Operations (FRM) Committee - Substitute Teacher Calling Alternative

Preservation Hall A - LAB

Join Mark Michelini, Adlai E. Stevenson High School, Lincolnshire, IL and Lynn Elkins, American Com-Source Technologies, as they hop on line and demonstrate live, how Stevenson used the Primer sub scheduling solution. 24/7 live call center handles absences and their filling and combines with web based technology. Primer not only fills vacancies but provides a range of value, reduces unemployment claims, provides data for payroll, retains valuable subs, distributes jobs fairly, provides authorized site managers extensive data in seconds and is generally less expensive than a sub caller's comp/benefits plus without requiring your management.

*Speaker(s): Mark S. Michelini, Dir./Business Services, Adlai E. Stevenson HSD 125, Lincolnshire, IL
Lynn Elkins, President, American Com-Source Technologies, Inc., Lansing, IL*

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Legal Issues (EE) Committee - Update on Special Education Law

Broadway A (100)

Congress is expected to reauthorize the Individuals with Disabilities Education Act ("IDEA") within the next several months. Come and learn of the changes in the federal special education law including changes in your school district's child find obligations, evaluation procedures, how to convene an IEP meeting, and how to discipline a disabled student. Revisions to procedural issues, such as timelines, due process requests, parental notice and parental consent will also be discussed.

*Speaker(s): Maureen Anichini Lemmon, Partner, Ottosen Trevarthen Britz Kelly & Cooper, Ltd.,
Wheaton, IL*

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Public Policy & Intergovernmental Relations (EE) Committee - No Child Left Behind - Programs and Financial Impact

Salon V (140)

No Child Left Behind - What will it mean to my district?

*Speaker(s): Phil Hanson, ISBE Consultant, Chicago Public Schools, Chicago, IL
Xavier Botana, Director in NCLB Accountability, Chicago Public Schools, Chicago, IL
Anthony D'Amato, Attorney, Franczek Sullivan P.C., Chicago, IL*

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Strategic Planning (IM) Committee - How Wireless Will Transform School Design

Sapphire (50)

Wireless networks are poised to spark changes in school design because they allow every student to access information from anywhere in a school. How will wireless affect your school? In this session you will learn how wireless will modify the configuration of public spaces, labs and classrooms. You will hear about the effect of wireless communication on furniture and display equipment. You will also explore the changes in curriculum that wireless devices drive, as well as network security issues. The session is a vendor-independent perspective on the deployment of wireless technology.

Speaker(s): Craig M. Williams, Chief Information Officer, Naperville CUSD 203, Naperville, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Professional Development (HRM) Committee - New Requirements for Administrative Certificate Renewal (Repeated Thurs., 10:15 am)

Salon II (300)

Administrators will gain an understanding of the new Administrator Recertification Law and the ISBE rules that have been approved to implement the new law. The presenter will also review Illinois Professional School Leader Standards as they apply to the superintendent, the principal, and the school business manager. Information will be provided on the time lines and the process for developing the individual professional development plan.

Speaker(s): Calvin C. Jackson, Legislative & PD Consultant, Illinois ASBO, Fairbury, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Professional Development (HRM) Committee - Operating Under the New Ethics Bill; How Will it Effect Your District's Business Practices?

Broadway C (100)

This will be a panel discussion of the new Ethics Bill that becomes effective June 9, 2004. The panel will explore the following issues:

What was the Bill's intent?

What does your district need to know and do immediately to be in compliance?

What are prohibited activities?

What are acceptable practices?

How does the State intend to enforce the law?

Case Law/studies.

*Speaker(s): Lisa Madigan, Attorney General, State of Illinois, ,
Vern Kowal, Partner, Freeborn & Peters, Chicago, IL
Jean Chrostoski, Superintendent, Nokomis SD 22, Nokomis, IL
Michael A. Collins, Superintendent, Carlinville CUSD 1, Carlinville, IL*

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Personnel & Benefits Administration (HRM) - New Employee Checklist

Arnold Palmer (50)

"Do I have to fill all this out?" Is that a question your personnel/payroll department frequently hears from new employees? Find out what forms are required for different positions in a school district, what to do if forms are not filled out completely, and what to do if incorrect information is given.

Speaker(s): Nancy L. Fruscione, Dir./Business Support Servs., Woodridge SD 68, Woodridge, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Purchasing (PAM) Committee - Electronic Filing and the Law

Turquoise A/B (80)

School districts are continually faced with the problem of filing important documents and the retrieval of these documents. Every summer, files of payroll, accounts payable and special education and regular student material is boxed and placed into unlocked, unsecure storage rooms. Usually, the rooms become so cluttered that it is almost impossible to find the filed information. In fact, many hours are used to find data.

Consequently, this session will assist school districts to develop a plan to remove clutter and to accurately have access to files in a very timely manner. The answer is to file documents electronically. An electronic filing system will store and retrieve proper documents.

In addition, electronic filing will reclaim space that is occupied by expensive storage boxes or file cabinets. It will also increase efficiency of staff members who will be able to retrieve documents quickly and accurately. School districts will be more responsible to parents or other school districts that request information. Electronic filing will eliminate the problem of lost files.

This fast-paced and timely session will discuss the record retention process presented by a member of the State of Illinois Department of Record Retention. Also presenting will be a representative from a document imaging company who will provide information on the use of electronic filing and how it can improve record storage and retrieval.

Speaker(s): Jerry Breitbarth, President, TKB Associates, Inc., Westmont, IL

Steve Colaizzi, Field Representative, Local Records Unit, State of Illinois, Springfield, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Accounting, Auditing & Financial Reporting (FRM) Committee - School District Financial Profile - How to Use It & What It Means

Salon VI (140)

Review of the school district financial profile criteria, incorporating components into Board of Education policy, and developing model deficit reduction / financial plans.

Speaker(s): Craig A. Schilling, Asst. Supt./Business Affairs, Glenbrook HSD 225, Glenview, IL

Debby Vespa, Division Administrator, IL State Board of Education, Springfield, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Budgeting & Financial Planning (FRM) Committee - Financial Projections Made Easy

Broadway B (100)

Forward thinking Superintendents and School Boards want to make decisions based on sound financial data and projections. Learn how one school district has survived educational, technological and community challenges through the use of simple forward thinking financial projections. This session will incorporate some easy to follow steps to aid you in the process of developing financial projections.

Speaker(s): Thomas A. Filipiak, Dir./Business Services, Lockport Twp. HSD 205, Lockport, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Risk Management (AS) Committee - Property & Liability - Current Trends

Ruby (80)

Find out what is happening in the Property/Casualty market. Is your district ready? Are costs ever going to stabilize? Come to this session and find out how you can reduce your districts insurance program costs.

Speaker(s): Michael J. McHugh, Vice President, Marsh USA, Inc., Chicago, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Risk Management (AS) Committee - Current Employee Benefit Trends

Coral (50)

An in-depth look at benefit trends - where we've been, where we are, where we're going and will you be ready?!

Speaker(s): Jeff Kolker, Vice Pres./Employee Benefits, GCG Financial, Inc., Bannockburn, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Cash Management, Investments & Debt Management (FRM) Committee - Managing Your Credit Rating in Difficult Times/Best Practices

Jade (50)

Although many Illinois school districts are under increased financial strain due to the impact of tax caps and increased health care and other costs, from a rating agency point of view, some districts are more of a credit concern than others. This session will explore the importance of management in the setting or maintenance of a credit rating as it addresses the fiscal challenges set before it. Examples from within Illinois will be used. The difference between a troubled credit in danger of a rating adjustment vs. a challenged credit under typical stress will be specifically addressed.

Speaker(s): John Kenward, Director, Standard & Poor's, Chicago, IL

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Maintenance & Operations (FM) Committee - Custodial Services, Privatizing? Should I? How Do I Begin?

New Orleans (300)

Why would I want to outsource my custodial services? Is it the right thing for my district? Legal steps to take if you are considering privatization. Bid requirements, specifications & RFP.

*Speaker(s): Gary B. Stanley, Dir./Facilities, Aptakasic-Tripp CCSD 102, Buffalo Grove, IL
Terry Hodges, Lawyer, Hodges, Loizzi, Eisenhammer, Rodick & Kohn, Arlington Hts., IL
Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Addison, IL*

Wednesday, 5/5/2004

11:00 am - 12:00 pm

Food Service (AS) Committee - Go FISH! Create the Workplace You've Been Searching for With the Global Phenom, the FISH, Philosophy

Ben Hogan (50)

Change attitudes, improve service, catch the limit in job satisfaction!

Speaker(s): Patricia Fournier, Director of Food Services, Thornton Fractional Twp. HSD 215, Calumet City, IL

Wednesday, 5/5/2004

12:00 pm - 4:00 pm

- Exhibits Open

Exhibit Hall

Wednesday, 5/5/2004

12:00 pm - 1:30 pm

- Lunch

Mega Center

Wednesday, 5/5/2004

12:30 pm - 2:00 pm

- Executive Director Search Committee Meeting

Preservation Hall B (50)

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Risk Management (AS) Committee - Management Strategies for Controlling Asthma and Allergies in Schools

Broadway C (100)

Asthma and allergies affect approximately 5,000,000 children (11% of the student population) and is the leading cause of absenteeism in schools (approximately 10,000,000 missed day/year in the US).

The program will discuss management strategies including identification and control of asthma/allergy triggers in schools and policies that can be implemented to open communication between district officials, parents, faculty and staff. An effective management program will reduce risk of health complaints, improve attendance and promote positive public perception.

*Speaker(s): Robert E. Rottersman, Environmental Consultant, Boelter & Yates, Inc., Park Ridge, IL
Karrie D. Donat, Environmental Consultant, Boelter & Yates, Inc., Park Ridge, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Accounting, Auditing & Financial Reporting (FRM) Committee - Budget, Levy, Financials: Are You Meeting Your Filing Requirements?

Salon VI (140)

Ever wonder if you published the correct legal notice? Don't know how you should receive a specific document? Missed a filing deadline recently? This session will explore the legal requirements that school districts must meet in order to adopt and file their annual budget, levy and audit. We will also discuss legal requirements for bid documents, the prevailing wage statement, economic interests,

freedom of information procedures and other documents. A checklist and example for each filing requirement will be provided.

*Speaker(s): Michael J. Locigno, Business Manager, Berkeley SD 87, Berkeley, IL
Patricia McAndrews, Dir./Business, Wheeling CCSD 21, Wheeling, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Communications (IM) Committee - Basics of Excel

Preservation Hall A - LAB

This session will teach you formulas, charts, tables, object linking and embedding, formatting and linking worksheets in Excel.

Speaker(s): Thomas J. Zelek, Sr., Business Manager, Elmwood Park CUSD 401, Elmwood Park, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Budgeting & Financial Planning (FRM) Committee - Tracking Your Cost With Meaningful Data

Salon V (140)

Do you really know how you're spending your money? As funds become more scarce, are you prepared to provide decisional data for your Superintendent, Board of Education, and the community? Learn why it's important to identify costs and how various districts track costs via their district budgets. Join in a discussion about the importance of comparing apples to apples between schools or districts.

*Speaker(s): Ruth S. Gloede, Asst. Supt./Business Services, Comm. Cons. Sch. Dist. 59, Arlington Hts., IL
Fonzie Richmond, Dir./School Business Svcs., Chicago Public SD 299, Chicago, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Principles of School Finance (FRM) Committee - Communicating Financial Information with Integrity to Your Board

Broadway A (100)

Learn how to build trust with the Board of Education by providing information they thirst for.

Speaker(s): Ric C. King, CPA, Controller/Dir. of Facilities, Schaumburg CCSD 54, Schaumburg, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Cash Management, Investments & Debt Management (FRM) Committee - How Did Check 21 Come to Be & Is There An Impact to Your District

Sapphire (50)

Understand why 21 Legislation is important and how it may impact your district. A brief look at check clearing today and an in-depth discussion and definitions of check truncation vs. check conversion. What's available and how it can improve your funds availability.

*Speaker(s): Kimberly M. Feeney, Treasury Mgmt. Sales Officer, Bank of America, Chicago, IL
Julie Conenna N.A., Vice President, LaSalle Bank N. A., Chicago, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Cash Management, Investments & Debt Management (FRM) Committee - How Swaps & Variable Debt Might Benefit Your District Following Passage of 93-9

Salon IV (140)

New Public Act 93-9 allows districts to use risk management strategies and derivatives to lower interest costs and diversify debt portfolios. Did you know you can now refund outstanding bonds and take the interest cost savings as up-front cash which can be used for operations or capital projects? Understand the risks, benefits and rating agency implications of these exciting (and sometimes daunting) new financing alternatives.

*Speaker(s): Larry White, Partner, Chapman and Cutler, Chicago, IL
Todd S. Krzyskowski, Director, Banc One Capital Markets, Inc., Chicago, IL
Ivan Samstein, Assistant Vice Pres./Analyst, Moody's Investors Service, Chicago, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Maintenance & Operations (FM) Committee - Hazardous Waste, Dispose of it How?

Coral (50)

Hazardous waste, dispose of it how?

- 1) Identifying the types of waste
- 2) All educational departments have hazardous waste
- 3) Storage methods
- 4) Precautionary handling measures
- 5) Record keeping
- 6) Disposal methods

Special & Universal Waste

- 1) Identification
- 2) Handling
- 3) Storage
- 4) Record keeping
- 5) Disposal methods

*Speaker(s): John B. Losch, Account Executive, Air Cycle Corporation, Broadview, IL
Becky Lockart, Educational Coordinator, Illinois EPA, Ofc. of Pollution Prevention, Springfield, IL
Tim Settles, President, Eco Clean Corporation, Raymond, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Transportation (AS) Committee - Clean Air Act / Bus Idling Guidelines and Facts

Ben Hogan (50)

Will your district be ready for the new EPA regulations by 2007?

Speaker(s): Tom Pelletier, Fleet Maintenance Manager, Naperville CUSD 203, Naperville, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Purchasing (PAM) Committee - P-Card

New Orleans (300)

Every time a school district issues a purchase order for less than \$2500.00, it wastes \$75.00 - \$200.00 in processing costs. That equates to 4% or MORE of the dollar value of the items being purchased. Shipping fees often get added to this as well. The current technology of a P-Card can drastically reduce these costs and improve the internal controls built into most purchasing systems. In this

session, participants will learn 1) how to stream-line their procurement process, 2) how to customize a card for every employee selected to use a card, 3) how to use the free on-line purchasing management information system provided by the program, and 4) how the rebate program actually expands what is available to purchase all kinds of products and services. The Illinois Association of School Business Officials (Illinois ASBO) created and manages the P-Card program. Illinois ASBO, IASA, IASB and IPA sponsor it. This program is provided on a state-wide basis to 1) reduce the legal costs of each school district setting up its own program, 2) create rebates at levels a single district could not obtain and 3) create an annual purchasing volume that provides a more favorable contract with the P-Card provider (Master Card - Harris Bank/BMO) that a single district could not create on its own. One year ago, there were no cards, no participants, no purchases. Today over 45 districts with over 500 cards have transacted over \$1,750,000 in purchases. It's simple, it's state-of-the-art, it complies fully with Illinois law and it's NOW.

*Speaker(s): Ronald E. Everett, Executive Director, Illinois ASBO, DeKalb, IL
Allen J. Albus, Asst. Supt./Finance & Treasurer, Naperville CUSD 203, Naperville, IL*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Planning & Construction (FM) Committee - New Spaces From Old Places: Managing the Cost of Change

Turquoise A/B (80)

Properly planned existing schools, when based upon established trends in curriculum/technology/design can be as good, if not better than new...sometimes at a much lesser price. This session will present local and national examples of remodeled schools that directly improve learning potential in K-12 facilities at equal or lesser cost to new construction. Elementary classrooms, science labs, emerging trend in business partnerships, off-site education, and integrated technology education Learning Atriums will be profiled for remodeled and/or new construction. Physical trend-setting design concepts will be blended with the psychological challenges of changing entrenched status quo educators into successful proactive futurists. Holistic curriculum understanding, when properly combined with creative design can be cheaper and more affective than new construction. Come ready to be challenged and willing to participate.

Educational Objectives:

1. Discover new design concepts/emerging trends that can be implemented in existing buildings that satisfy the educational program, and cost less than new construction.
2. Understand direct correlations of learning style to design of building and the potential impacts on learning potential and GPA.
3. See how educational understanding can make remodeling better than new construction, cheaper, and still have consensus/approval of educators.
4. Realize that the "people process" of change is critical to creating practical and usable "schools of the future".

*Speaker(s): Samuel J. Johnson, Principal, BLDD Architects, Inc., Decatur, IL
Franklin Hill, Ph.D., Principal, Franklin Hill & Associates, Inc., Bellevue, WA*

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Personnel & Benefits Administration (HRM) Committee - TRS Update - What's New?

Salon III (140)

Jeff Proffitt, TRS Employer Services Auditor, will update you on how the latest legislation will affect such things as your Sick Leave Service Credit, Post-Retirement Employment, and other hot topics.
Speaker(s): Jeff Proffitt, Employer Services Auditor IV, Teachers Retirement System (TRS), Springfield, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Planning & Construction (FM) Committee - Managing Construction Projects

Jade (50)

What Should be in Construction Bid Documents? The Key to a Successful Project.

Construction projects are complex, expensive, and time consuming efforts for any school district. Get it right the first time because there is no second chance. The successes and failures of any project will live with us for the next 5, 10, and 15 years or more. The session reviews the list of elements that go into bid documents which are the pillars in which to build your project's success.

Speaker(s): Frederick J. Ringe, Vice President, EMA Chicago, Inc., High Lake, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Cash Management, Investments & Debt Management (FRM) Committee - Levy and Budgeting Strategies

Broadway B (100)

Are you looking at a deficit operating budget? Is a rate referendum in your future? Can you show a long term need for a rate increase? How does Chicago assessment affect suburban Cook County district levies and things you should not forget? How would change in a multiplier impact your tax extension? How to implement multivariate levy strategies? Rate increase factor and how does it work? What is the cost of "Tax-Cap" on your School District? In this information packed session, we will try to answer these questions and many more.

Speaker(s): Michael R. English, President, PMA Financial Network, Inc., Warrenville, IL

George M. Lingel, Retired SD Business Official, , Rockford, IL

Vladimir Dragosavljevic, Vice President, PMA Financial Network, Inc., Warrenville, IL

Wednesday, 5/5/2004

2:00 pm - 3:00 pm

Maintenance & Operations (FM) Committee - Frugal & Effective: The Design Choices You Make

Ruby (80)

You can have a creative and properly functioning learning environment on any budget. A team consisting of an architect, an engineer and a school business manager will discuss:

. The owner's role, particularly the value of timely decisions and communicating goals;

. The impact of system and material selection considering

- Initial cost,
- Long term costs of energy,
- Maintenance manpower,
- Direct repair/replacement costs,
- Durability,
- Air and environmental quality,
- Functionality

. The value of early Construction Manager/Contractor collaboration with Construction Manager's contractors, vendors and all levels of staff.

Speaker(s): Kerry Leonard, Principal/Sr. Educational Facilities, OWP/P Architects, Inc., Chicago, IL

*Tom Squillo, Mechanical Engineer, OWP/P Architects, Inc. , Chicago, IL
Raymond L. Costa, Jr., Dir./Business, Beach Park CCSD 3, Beach Park, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Legal Issues (EE) Committee - Working With the School Attorney

Salon III (140)

UNDERSTANDING THE ATTORNEY'S ROLE AND WORKING TOGETHER TO BETTER PROTECT THE DISTRICTS

School attorneys have special obligations that are important for school administrators to understand. The Rules of Professional Responsibilities that govern the conduct of attorneys as well as civil practice rules and court decisions require attorneys to make certain responses and take certain actions that non-lawyers may not understand but should know. In this presentation, we will first review some of the more significant rules including: the obligations of the attorney to the Board as an entity and the community; conflicts, insurance defense and investigations.

After this review, the presentation will turn to a discussion of practical procedures that can be implemented to better avoid legal errors, establish better communication and conserve district resources.

*Speaker(s): James P. Bartley, Partner, Klein, Thorpe & Jenkins, Ltd. , Chicago, IL
Rinda Allison, Attorney, Klein, Thorpe & Jenkins, Ltd. , Chicago, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Professional Development (HRM) Committee - Visitor Tracking Software with Registered Sex Offender Screening (Repeated Thurs. 9:00 am)

Salon IV (140)

Maintain a safe school. Prevent the unwelcome visitor or personnel. Have the ability to manage restraining orders, volunteer activity, registered sex offenders, student in/out activity, meetings, track personnel, etc. Utilize the Illinois State Police Sex Offender Database with the swipe of a drivers license in a magnetic scanner. Learn about V-soft, a web-based software application that helps schools track visitors, students, faculty and volunteers to enhance school and campus security. Multiple alert features help share information between law enforcement and schools regarding known sex offenders, suspended or expelled students, known gang members, parents with restraining orders, drug dealers, irate parents, students from rival schools and more. Keep your schools and school users safe.

*Speaker(s): Rick Roman, Account Executive, Convergent Technologies LLC , Buffalo Grove, IL
Allan Meason, President & CEO, Convergent Technologies/Raptor Technologies , Buffalo Grove, IL
Justin Waldrip, Chief Technology Officer, Convergent Technologies/Raptor Technologies , Buffalo Grove, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Risk Management (AS) Committee - Insurance Survey Results & Analysis

Jade (50)

This survey provides data which can be used as a benchmark for bargaining purposes. A great management tool!

Speaker(s): James P. Kennedy, Consulting Practice Director, Mack & Parker, Inc. , Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Budgeting & Financial Planning (FRM) Committee - Costing Out Salary Schedules for Negotiations

Salon V (140)

When negotiating, it is essential to use the proper method of projecting the effects of teachers' movement on the salary schedule and of proposed changes in the schedule. Errors in this process can lead to bargaining mistakes that can ruin both budgets and the business manager's career. Learn the methods of projecting salary schedule costs and how the results can be used to plan bargaining strategies.

*Speaker(s): James Zuchl, Attorney, Franczck and Sullivan , Chicago, IL
William Harkin, Asst. Supt./Business Services, Wauconda CUSD 118, Wauconda, IL
James B. Fritts, Visiting Asst. Professor, Loyola University Chicago , Chicago, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - What You Should and Shouldn't Be Doing in This Low Interest Environment

Salon VI (140)

Are the rates going up or are they going down? What impacts the market? What questions you need to ask before you invest. Learn the hidden costs of high returns. What you don't know can hurt you. Come and learn from one of the experts.

Speaker(s): William T. Sullivan, Jr. , Managing Director, Public Financial Management , Ronkonkoma, NY

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Communications (IM) Committee - Gold Mine - Wireless Wide Area Networks

Salons I, II (650)

See the newest technology available for speeding up your district's "Wide Area Network". Wireless Wide Area Networks can speed your network up by 30 times that of conventional telephone lines and do it at a lesser cost.

*Speaker(s): Thomas R. Long, Asst. Supt./Business, Burbank SD 111, Burbank, IL
Rehman R. Ali, District Technology Director, Burbank SD 111, Burbank, IL
Thomas J. Zelek, Jr., Business Manager, Elmwood Park CUSD 401, Elmwood Park, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Principles of School Finance (FRM) Committee - Gold Mine - Managing Your Debt: Borrowing for Construction

Salons I, II (650)

Add some rope to the end of your rope, make sure you are accessing your borrowing ability with maximum effectiveness.

Speaker(s): James N. Rachlin, Sr. Vice President, Griffin, Kubik, Stephens & Thompson, Inc. , Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Principles of School Finance (FRM) Committee - Gold Mine - Short-Term Financing Options

Salons I, II (650)

TAWS, TANS, State Aid Warrants, L.O.C.'s, Working Cash Fund Bonds and Debt Certificates.

Are you looking for a financing bridge to carry your district to cash-flow nirvana? Or do you simply need an efficient tool for funding technology? An overview of the pluses and minuses of various options, as well as a few tips on minimizing the interest cost.

Speaker(s): Robert J. Bergland, Sr. Vice President, Hutchinson, Shockey, Erley & Co., Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Planning & Construction (FM) Committee - Gold Mine - Leadership in Energy and Environmental Design (LEED Certification)

Salons I, II (650)

LEED Design. How does it differ from "conventional" building design and what does it cost?

Does your district need more money? Did you know a LEED rated building can qualify for State, Federal and Utility grants and rebates - which translates into money for a new teacher or educational program? We will discuss how. We will also review the LEED rating system. America's schools spend more than \$6 billion each year on energy. The DOE estimates they could save 25 percent of that money - \$1.5 billion nationally - through better building design, widely available energy-efficient and renewable energy technologies, and improvements to operations and maintenance. We will cover how LEED design concepts can be employed for new construction, remodeling and renovation projects alike. The added benefit to LEED design is students who learn better and teachers who teach better.

Speaker(s): Anil Ahuja, Sr. Vice President, CCJM Engineers, Ltd., Chicago, IL

Joseph C. Bardusk, AIA, Vice President, CCJM Engineers, Ltd., Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Indoor Air Quality - Facility Operation and Maintenance Strategies

Broadway C (100)

The session will focus on Facility Maintenance and Operations (O&M) from an indoor air quality perspective. Information will be provided on common sources of air contaminants and how O&M practices can be refined to reduce the risk of occupant complaints.

Speaker(s): Robert B. Rottersman, Sr. Environmental Consultant, Boelter & Yates, Inc., Park Ridge, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Gold Mine - Planning Your Future Energy Needs

Salons I, II (650)

Trends and what to consider for planning current and future natural gas supply. Ways to control, identify and minimize exposure to adverse energy commodity price movement. How to achieve goals and objectives regarding energy.

Speaker(s): Ted Lenart, AVP - Supply Operations, NICOR, Naperville, IL

John Snell, Risk Management, NICOR, Naperville, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Gold Mine - Custodial Standards

Salons I, II (650)

How much time can be created through mechanization? What are the correct procedures and standards for taking care of the carpet and hard surface flooring? What productivity rate is realistic?

*Speaker(s): Willie DiFabio, Senior Account Representative, 3 M, Glen Ellyn, IL
Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Addison, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Planning & Construction (FM) Committee - Gold Mine - Sustainable Schools Benefits to the Environment and Community

Salons I, II (650)

Taking a look at an actual example of a school that incorporated several aspects of sustainability into the construction of the Roy Lee Walker Elementary school. The McKinney Independent SD looked at building a sustainable school based on meeting the needs of today's children without compromising or sacrificing the ability of future generations to meet their needs.

Designers were able to utilize features such as wind energy, solar energy, daylighting, and rain harvesting; using each of these environmentally conscious design features in the everyday class curriculum to teach students.

The session will be an overview of this district and how they went about building this first of three sustainable schools.

*Speaker(s): Christopher J. Johnson, Account Executive/Ed. Specialist, Interface Flooring Systems, Chicago, IL
Lois Vitt Sale, Corporate Vice President, Wight & Company, Chicago, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Facility Designation Program (FM) Committee - Gold Mine - Educational Facility Management Professionals' Designation Program - What Is It?

Salons I, II (650)

Are you new to the job? Have your job duties changed? How do you build a base of understanding in your area of responsibility? By enrolling in the Designation Program, that's how! Have questions? Come and ask them!

*Speaker(s): James A. Wuerffel, Dir./Buildings & Grounds, Park Ridge Niles SD 64, Park Ridge, IL
Grant L. Sabo, Dir./Facilities & Transportation, Berkeley SD 87, Berkeley, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Gold Mine - Implementing the Green Schools Program in Your District

Salons I, II (650)

Green Schools presentation.

Speaker(s): Annette McCarthy, P2 Education Coordinator, Illinois EPA - Ofc. of Pollution Prevention, Springfield, IL

Becky Lockart, Pollution Prevention Specialist, Illinois EPA, Ofc. of Pollution Prevention, Springfield, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Risk Management (AS) Committee - Gold Mine - GASB 34 Appraisals

Salons I, II (650)

Learn the steps you need to accomplish to cope with GASB 34.

Speaker(s): Sean R. Rager, Regional Sales Manager, Industrial Appraisal Company, Park Ridge, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - Operating Student Activity Accounts

Coral (50)

This session is designed to offer ideas about operating student activity accounts. It will take into consideration drafting a Student Activity Manual, to handling cash on a daily basis, to implementing procedures ensuring prior authorization of expenditures. You will also learn how to protect your school district from loss of funds.

*Speaker(s): Patricia McAndrews, Dir./Business, Wheeling CCSD 21, Wheeling, IL
Ronald C. Steigerwald, Statewide Marketing Director, Illinois Energy Consortium (IEC), Buffalo Grove, IL
Richard J. Hendricks, Asst. Supt./Business, Oak Lawn CHSD 229, Oak Lawn, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - Gold Mine - How to Rate a Bond, Dissecting the Moody's Rating Process

Salons I, II (650)

Ever wonder how exactly Moody's assigns its bond ratings to school districts? Discuss the rating process in an informal setting, ask questions about potential impacts on a rating, talk about the variables used in the process and maybe even take a stab at rating a few anonymous "credits".

Speaker(s): Ted Damutz, Vice President/Manager, Moody's Investors Service, Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Planning & Construction (FM) Committee - Gold Mine - Environmental Issues

Salons I, II (650)

Do you know what is currently going on with environmental issues in Illinois schools?

- Pending legislation on mold and indoor air quality
- Lead based paint requirements in schools
- Asbestos inspections and reinspections
- "Green Building" operations and maintenance

Be sure to stop by for updates on regulations, web links to essential reference materials and best practices being implemented by your colleagues.

Speaker(s): Sandra L. Mattson, President, Mattson Associates, Ltd., Downers Grove, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Planning & Construction (FM) Committee - Gold Mine - Coming Soon, 10 Year Life Safety

Salons I, II (650)

Illinois State Board of Education and the Regional Offices of Education require that all districts complete 10 year safety survey reports for all education facilities in each district. Homeland Security now uses this information for planning/funding, etc. within various communities in the Chicagoland Area. Updated or New Surveys are required. These are NOT Annual Health Life Safety Reports.

Speaker(s): Roger Muterspaugh, Sr. Architect, Cordogan, Clark & Associates, Aurora, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Personnel & Benefits Administration (HRM) - Gold Mine - Voluntary Long-Term Care: Is Your District on Board?

Salons I, II

This is the one voluntary insurance benefit that many school districts have added to their benefits line-up because of the tremendous social and media attention it has received. Since neither Medicare, nor TRS, nor IMRF provide for Long-Term Care and so many school retirees and baby-boomers will be accessing this need, what has your District done to prepare? This voluntary coverage is available for school employees, retirees and their families.

Speaker(s): Lena Borski, Vice President, GCG Financial, Inc., Bannockburn, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Technology for School Finance Operations (FRM) Committee - Geographic Information Systems (GIS) for Schools

Broadway B (100)

School District Administrators make important decisions everyday using information from a variety of sources. Geographic Information Systems (GIS) is a single-source mechanism to support effective decision-making within a school district. GIS is the tool to perform district planning, redistricting, student mapping, school bus routing, forecasting and other applications.

*Speaker(s): Dave Tallman, Community Development Coordinator, Shive-Hattery, Inc., Moline, IL
Ray Weiser, GIS Specialist, Shive-Hattery, Inc., Moline, IL*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Real Estate Management (PAM) Committee - Facility Usage of America's 2nd Most Underutilized Facility: Schools

Sapphire (50)

Educational facilities are the 2nd most underutilized facility next to churches in the United States. School boards are aggressively pushing the staff to allow the public to use the school facilities for community group usage after school. This creates new challenges that create coordination issues, increased operating costs, opportunities for revenue enhancement, and communication problems. SchoolDude explores strategies to effectively manage the process by examining the responses to these challenges from over 500 educational institutions in a national survey.

. SchoolDude's national facility usage survey of over 500 school districts

- . The political aspects of facility usage with the community
 - . The growth of community usage
 - . The problems with the process
 - . Average events per year based on student size and demographics
 - . How to streamline the scheduling process and save \$10 - \$20 per student in time and increased cost recovery
 - . Legal considerations in setting policies
 - . Internet solutions for facility scheduling
- Recently presented at:
- . Various state workshops
 - . Survey summarized in American School & University Magazine
- Speaker(s): Scott V. Carpenter, Vice Pres./Sales, SchoolDude.com , Cary, NC*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - Gold Mine - Are Your 'Collateralized Deposits' Really Safe?

Salons I, II (650)

School districts have recently lost thousands of dollars when their deposits were improperly collateralized. Do you know if your deposits are safe? Find out what it means to have a 'perfected security interest' in your collateral. Learn the 'best practices' of collateralizing deposits. Hear the horror stories and learn how to avoid them.

Speaker(s): Jeffrey K. Schroeder, Sr. Vice President, PMA Financial Network, Inc. , Warrenville, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Risk Management (AS) Committee - Five Keys to Effective School Security

Ruby (80)

How can you measurably improve school security without taking on the appearance and budget of a maximum-security facility? Reap the benefits of implementing a collaborative and comprehensive approach to school safety and security. Attendees will receive specific instruction about: 1) Important Policies, 2) Appropriate Devices, 3) Proven Prevention Programs, 4) Effective Staff Training, and 5) Emergency Preparedness. Don't miss this opportunity to learn how to implement practical strategies and access important resources for your security program.

Speaker(s): Paul Timm, PSP, Vice President, RETA Security, Inc. , Lemont, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Risk Management (AS) Committee - Gold Mine - Retiree Exit Plan

Salons I, II (650)

This is a session for school districts to consider offering their retirees, or impending retirees; information on the issues confronting the retiring educator and specifically, how to avoid the common mistakes retiring educators make.

Speaker(s): Wayne B. Berzon, Senior Associate, GCG Financial, Inc. , South Bannockburn, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - Gold Mine - Referendum Strategies

Salons I, II (650)

If a district has gotten itself into budget trouble because it has given away pay raises that it cannot afford, how should it frame the referendum public information strategy? If a district needs to cut, if a referendum fails, should the district pass the cuts before the referendum date? When should the layoff notices happen? If a district has administrators and board members that do not want to admit publicly how the district got into such financial straits that a referendum is needed, what strategy should the district use? Should a district emphasize that a referendum will have little cost impact? Should a district employ an entitlement strategy in a referendum campaign? For example, "We have not had a referendum tax rate increase since 1973." Should a district employ a comparative argument in its referendum campaign? For example, "We tax at a lower rate than our neighboring districts." How can districts make clearer the need for passing the referendum? How do you tell a Superintendent that voters do not appreciate fully the extent of the need? In other words, when your Superintendent cannot turn without feeling the need how can you explain that many voters and non-registered parents are blissfully unaware of any problem or need. When should a district schedule a referendum? The low turn-out controllable election or a high turnout presidential election? What can be done to identify, qualify, and motivate potential "Yes" voters? What happens if the voters who are needed for passage only show up to vote in presidential elections?

Speaker(s): Raymond F. Coyne, Sr. Vice President, Hutchinson, Shockey, Erley & Co., Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Personnel & Benefits Administration (HRM) - Gold Mine - A Helping Hand From the Internal Revenue Service (IRS)

Salons I, II (650)

The Office of Federal, State & Local Governments of the Internal Revenue Service Government Entities Dept. (federal, state, local governments, schools, colleges and universities). Topics to include: Retirement Plans, Part Time and Summer Salaries and Social Security, IRS Reporting Procedures and Unresolved Tax Problems. Get assistance available from the IRS.

Speaker(s): Jannie Smith, Field Specialist, Internal Revenue Service (IRS), Downers Grove, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Technology for School Finance Operations (FRM) Committee - 21st Century Solutions for Administrative Systems (Student, Financial, Academic, & Instructional) in Education - Panel Discussion

Turquoise A/B (80)

Join this one of a kind, nationally recognized team of software engineers, developers and educators for a discussion of 21st Century Solutions for Administrative Systems. Compare the solutions provided by your district with those of our team of experts - How does your Network stack up? Is your district SIF Compliant? Will it be? How will your district meet the new reporting requirements associated with NCLB? If any of these topics trouble you, DON'T MISS THIS SESSION!

*Speaker(s): Denny Insell, iSeries Senior Consultant, IBM, Little Rock, AR
Joan Keebler, President, Crosspoint Educational Systems, Inc., CrossPointe, LLC, Orlando, FL
Chris McCormick, Business Development Manager, Lawson / Kinsy & Kinsy, Glen Ellyn, IL
Joni Nevin Wing, Vice President, Timpanogos Technologies, Salt Lake City, UT*

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Risk Management (AS) Committee - Gold Mine - Health & Wellness Management

Salons I, II (650)

Successful companies understand the relationship between the health of their employees and their bottom line.

Let me show you how easy and convenient it is for you to provide an equitable benefit for all your employees.

Learn more about one of our services, Life Time Fitness Health coach. It's like having a personal trainer at your fingertips, access to your personal trainer anywhere, anytime.

Let Life Time Fitness assist you with bringing convenience to your fast pace lives.

This session is sponsored by GCG Financial, Inc.

Speaker(s): Christine Federico, National Account Manager, GCG/.Life Time Fitness Corporate Wellness, Warrenville, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Gold Mine - Illinois Clean Energy Community Foundation: Sponsors of Grant Programs for Lighting Upgrade Initiatives and Renewable Energy Projects

Salons I, II (650)

Discover useful information for schools seeking funding, including lists of past grant awards, information on the grant application process and announcements about new program initiatives that may be launched during 2005. Explore grant programs specific to K-12 schools such as energy efficient design of new facilities or for installation of small-scale solar or wind power generation systems.

Speaker(s): Robert Romo, Coordinator, Illinois Clean Energy Foundation, Chicago, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

Technology for School Finance Operations (FRM) Committee - Gold Mine - How to Save Significant Money on Your Telephone and Data Bills

Salons I, II (650)

Internets, Intranets, Voice over IP, IP addresses, T1 Lines, and cutting the cost of staying connected are just a few of the topics that have many of us stumped. Attend this session and have these questions and many more answered by our panelist.

Speaker(s): Jerry S. Steinberg, Sr. Consultant, Telesolutions Consultants, Bloomingdale, IL

Wednesday, 5/5/2004

3:15 pm - 4:45 pm

- Gold Mine Sessions

Salons I, II (650)

Wednesday, 5/5/2004

4:30 pm - 6:00 pm

- Hospitality

New Orleans (300)

Wednesday, 5/5/2004

8:00 pm - 11:30 pm

- Mixer

St. Charles Ballroom

Thursday, 5/6/2004

6:00 am - 7:00 am

- 5KM Run & Walk

meet outside Golf Pro Shop

Thursday, 5/6/2004

6:30 am - 8:30 am

- Continental Breakfast Available in Atrium (cash buffet)

bagels, doughnuts, danish, muffins, yogurt, fruit, juice, coffee, etc.

Thursday, 5/6/2004

7:00 am -

- Staff Details: Staff Schedule Thursday & Friday

Thursday, 5/6/2004

7:30 am - 9:00 am

- Professional Development Committees' Planning Meeting & Breakfast

Salons I, II, III, IV

Thursday, 5/6/2004

9:00 am - 9:50 am

- Annual Service Associate Business Meeting

Salon VI (140)

Thursday, 5/6/2004

9:00 am - 10:00 am

Legal Issues (EE) Committee - Land Donations & Impact Fees

Turquoise A/B (80)

Recent court challenges and legislation have highlighted the availability of, and limitations on, an important source of resources for school district capital improvements: municipal school land/cash developer donation ordinances and annexation agreements. This presentation will outline the different types of developer donations and impact fees, how they can be implemented and enforced, developments in the law, pitfalls in collecting and using the monies, and alternatives to cash donations.

Speaker(s): John M. Izzo, Partner, Scariano, Himes, & Petrarca, CHTD, Chicago Heights, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Public Policy & Intergovernmental Relations (EE) Committee - Spring Legislative Session

New Orleans (300)

Legislative Update - The Good, The Bad and The Ugly

Speaker(s): Calvin C. Jackson, Legislative & PD Consultant, Illinois ASBO, Fairbury, IL

Peg Agnos, Executive Director, LEND, Glen Ellyn, IL
Donna Baiocchi, Executive Director, Ed-Red, Park Ridge, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Strategic Planning (IM) Committee - Outsourcing vs. Insourcing, Lease vs. Buy

Jade (50)

What are the options for procuring technology products and services? A panel presents the pros and cons of outsourcing technology support to local service providers, and leasing vs. buying equipment. We will discuss 0 percent (and less than 0 percent) leases, and types of equipment to lease. We will review the cases for outsourcing technical support or MIS services, and for keeping this work internal.

Speaker(s): Terry Tamblyn, V. P./Educational Services, Tera Byte, Ltd., Downers Grove, IL
Christine E. Haeggquist, Marketing Specialist, Kirtley Technology Corporation, Darien, IL
Jason Marquardt, Account Manager, American Capital Financial Services, Lisle, IL
Craig M. Williams, Chief Information Officer, Naperville CUSD 203, Naperville, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Professional Development (HRM) Committee - Visitor Tracking Software with Registered Sex Offender Screening (Repeat of Wed. 3:15 pm)

Sapphire (50)

Maintain a safe school. Prevent the unwelcome visitor or personnel. Have the ability to manage restraining orders, volunteer activity, registered sex offenders, student in/out activity, meetings, track personnel, etc. Utilize the Illinois State Police Sex Offender Database with the swipe of a drivers license in a magnetic scanner. Learn about V-soft, a web-based software application that helps schools track visitors, students, faculty and volunteers to enhance school and campus security. Multiple alert features help share information between law enforcement and schools regarding known sex offenders, suspended or expelled students, known gang members, parents with restraining orders, drug dealers, irate parents, students from rival schools and more. Keep your schools and school users safe.

Speaker(s): Rick Roman, Account Executive, Convergent Technologies LLC, Buffalo Grove, IL
Allan Meason, President & CEO, Convergent Technologies/Raptor Technologies, Buffalo Grove, IL
Justin Waldrip, Chief Technology Officer, Convergent Technologies/Raptor Technologies, Buffalo Grove, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Communications (IM) Committee - Front Page Web Design - Part I (Part II Thurs. 10:15 am)

Preservation Hall A - LAB

This session is designed so that the novice web page designer with little or no experience, will be successful in a well-designed web page on the Internet. Participants will learn to design and post their own websites to the Internet. Actual web pages will remain on the Internet for participants to view after completion of the session. Web page design will be accomplished.

Speaker(s): Thomas R. Long, Asst. Supt./Business, Burbank SD 111, Burbank, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Purchasing (PAM) Committee - Using the Purchasing Manual on Illinois ASBO's Web Site

Arnold Palmer (50)

Come to this session to learn about the new on-line Purchasing Manual. Get the legal perspective from Ken Florey (Robbins, Schwartz, Lifton & Taylor, Ltd.). Get the practical "how to" approach from Steve East, Lorie Pilster and Barb Stephani.

*Speaker(s): Lorie M. Pilster, Coord./Business Services, Downers Grove SD 58, Downers Grove, IL
Kenneth M. Florey, Partner, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL
Barbara I. Stephani, Business Manager, Argo CHSD 217, Summit, IL
Steven M. East, Dir./Purchasing & Facilities, Township HSD 211, Palatine, IL*

Thursday, 5/6/2004

9:00 am - 10:00 am

Personnel & Benefits Administration (HRM) Committee - Consumer Driven Health Care

Broadway C (100)

This session will include an in-depth look at the current way schools provide benefits and how to maximize cost savings in many overlooked opportunities through self-funding and an in-depth overview of one of the new upcoming waves of the school benefits future, consumer driven healthcare and how to prepare for bargaining these benefits into negotiations. If time permits, we will also look at socially conscious voluntary benefits, which cost districts nothing, but are in such demand, such as long term care.

Speaker(s): Jeff Kolker, Vice Pres./Employee Benefits, GCG Financial, Inc., Bannockburn, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Budgeting & Financial Planning (FRM) Committee - Projecting EAV

Broadway B (100)

An assessor, city planner and financial advisor will discuss how to make better projections for your equalized assessed valuation and new property. You will learn what questions to ask when evaluating residential and commercial/industrial developments. How the assessment process works and how you can put it all together to make good projections over short and long term periods of time. New proposed legislation regarding property valuations will also be reviewed.

*Speaker(s): Warren Dixon, Naperville Township Assessor, Naperville Township, Naperville, IL
Craig Hullinger, City Planner, Administrator & Consultant, Tinley Park, IL
Steve H. Larson, Sr. Vice President/Director, Ehlers & Associates, Inc., Naperville, IL*

Thursday, 5/6/2004

9:00 am - 10:00 am

Accounting, Auditing & Financial Reporting (FRM) Committee - Board Reports: Does Your Board Understand You?

Coral (50)

Many financial reports are lengthy and complex documents put together by someone like yourself - a business administrator. And, of course, you know exactly how to read and interpret the data. But, how do you explain these complex reports to your board members so that they also are enlightened as to what these reports are saying and the direct implications to various budget items? It is one thing to report data - another to ensure that it is understood by those who receive the report. This session will focus on presenting financial documents to your board in a way that is easily understood.

Speaker(s): Stacey L. Bechard, Business Manager, Mundelein Elem. SD 75, Mundelein, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Maintenance & Operations (FM) Committee - Facility Breakfast Forum (ends 11:15 am)

Salon V (140)

Open forum discussion with Facilities and Buildings and Grounds Supervisors and Directors. A chance to meet your neighbors, share information and solutions. Have a cup of coffee and a roll. Share what you are doing. Share a problem. Perhaps you will find a solution.

*Speaker(s): Grant L. Sabo, Dir./Facilities & Transportation, Berkeley SD 87, Berkeley, IL
Joseph Bettuzzi, Dir./Buildings & Grounds, Culver School 71, Niles, IL*

Thursday, 5/6/2004

9:00 am - 10:00 am

Risk Management (AS) Committee - Light Duty - Return To Work

Ben Hogan (50)

Want to find out how you can reduce your districts Workers Compensation costs? Come to this session and learn how you can become a shining star in your district.

Speaker(s): Gordon Padera, Vice Pres./Risk Control Services, Gallagher Bassett Services, Inc., Itasca, IL

Thursday, 5/6/2004

9:00 am - 10:00 am

Principles of School Finance (FRM) Committee - School Finance Revenues for the Novice (ends 11:15 am)

Ruby (80)

This session is designed for the new board member, superintendent or business manager. The panelists will discuss the budget and levy cycles, property taxes, the impact of tax caps, state aid, and other major revenue sources.

*Speaker(s): Edward J. Hoster, Business Manager/Treasurer, Hinsdale Twp. HSD 86, Hinsdale, IL
Cheryl Crates, Adjunct Professor, Northern Illinois University, Barrington, IL*

Thursday, 5/6/2004

9:00 am - 10:00 am

Cash Management, Investments & Debt Management (FRM) Committee - Cash Flow Model (Part I) (Part II Thurs. 10:15 am)

Broadway A (100)

It has never been more important to prepare a quality Cash Flow Analysis with so many difficult issues facing schools such as deficit spending, increasing personnel and benefit costs, short-term interest rates at all time lows, a low CPI affecting the tax cap, and delayed state funding. The process of developing a Cash Flow Analysis will be discussed. Reasons to do a Cash Flow Analysis will initially be reviewed followed by an explanation and display of an Excel spreadsheet model. Developing micro and macro assumptions by asking key questions will be covered. Assembling a complete set of data elements will also be addressed. Finally, applying the Cash Flow Analysis to optimize interest income and to identify cash short falls will be discussed.

Speaker(s): Laura A. Pauli, Sr. Portfolio Advisor, PMA Financial Network, Inc., Warrenville, IL

Thursday, 5/6/2004

10:00 am - 3:00 pm

- Exhibits Open

Exhibit Hall

Thursday, 5/6/2004

10:15 am - 11:15 am

Technology for School Finance Operations (FRM) Committee - How to Save Significant Money On Your Telephone and Data Bills

Arnold Palmer (50)

Jerry Steinberg of Telesolutions Consultants will present details on how to save money. The school administrator can help reduce overall telecommunications bill costs by knowing a few key facts and using common sense. The consultant presents cases where school districts saved 20% to 30% off of their telephone and data communications bills.

Speaker(s): Jerry S. Steinberg, Sr. Consultant, Telesolutions Consultants, Bloomingdale, IL

Thursday, 5/6/2004

10:15 am - 11:15 am

Legal Issues (EE) Committee - Contaminated Buildings: Legal Issues and Liabilities

Jade (50)

Whether you oversee the new school building or the historic community landmark, you are a school official who wants your building to be safe for your students and employees. So how can you protect them from the hazards of a contaminated building? Mr. Bush addresses how to manage this risk whether you are at the contract-formation stage or you have just discovered mold in the building.

*Speaker(s): Derke J. Price, Attorney, Ancel, Glink, Diamond, Bush, DiCianni & Rolek, P.C., Chicago, IL
Margaret Pelletier, Hygieneering, Inc.*

Thursday, 5/6/2004

10:15 am - 11:15 am

Technology for School Finance Operations (FRM) Committee - What to Look For in Financial/Student Information Systems

Coral (50)

What are the right questions to ask vendors of financial or student information systems? What are the trends in these systems for the future? Two industry insiders provide insight about how to evaluate business systems for education.

*Speaker(s): Terry Tamblin, V. P./Educational Services, Tera Byte, Ltd., Downers Grove, IL
Christine E. Haeggquist, K-12 Marketing Specialist, Kirtley Technology Corporation, Darien, IL*

Thursday, 5/6/2004

10:15 am - 11:15 am

Professional Development (HRM) Committee - New Requirements for Administrative Certificate Renewal (repeat of Wed., 11:00 am)

New Orleans (300)

Administrators will gain an understanding of the new Administrator Recertification Law and the ISBE rules that have been approved to implement the new law. The presenter will also review Illinois Professional School Leader Standards as they apply to the superintendent, the principal, and the school business manager. Information will be provided on the time lines and the process for developing the individual professional development plan.

Speaker(s): Calvin C. Jackson, Legislative & Professional Development Consultant, Illinois ASBO, Fairbury, IL

Thursday, 5/6/2004

10:15 am - 11:15 am

Communications (IM) Committee - Front Page Web Design - Part II (Part I Thurs. 9:00 am)

Preservation Hall A - LAB

This session is designed so that the novice web page designer with little or no experience, will be successful in a well-designed web page on the Internet. Participants will learn to design and post their own websites to the Internet. Actual web pages will remain on the Internet for participants to view after completion of the session. Web page design will be accomplished.

Speaker(s): Thomas R. Long, Asst. Supt./Business, Burbank SD 111, Burbank, IL

Thursday, 5/6/2004

10:15 am - 11:15 am

Purchasing (PAM) Committee - GASB 34 and Beyond

Broadway B (100)

Now that your district has implemented GASB 34, or preparing to implement, it is time to discuss perpetuation issues to remain compliant in future years. We will discuss issues and questions raised by the 226 business officials that responded to the GASB 34 questionnaire. You will be able to see how your district compares with others on various capitalization issues.

An independent auditing firm will discuss how to interpret the financial information presented in the new GASB 34 financial statements.

*Speaker(s): John Rossi, Vice President, William F. Gurrie & Co., Ltd, Oak Brook, IL
Patrick J. Collins, District Manager, American Appraisal Associates, Oak Brook, IL
Jason Coyle, Manager, William F. Gurrie & Co., Ltd., Oak Brook, IL*

Thursday, 5/6/2004

10:15 am - 11:15 am

Risk Management (AS) Committee - Defending Your Tort Expenditures

Sapphire (50)

The legal issues regarding the proper expenditure of tort funds have become an increasingly frequent target for tax objectors; are you able to justify your tort levy, the accumulation of tort funds, and the expenditure of those funds? This presentation will cover not only common questions regarding the expenditure of tort funds, but also creative means to support your levy and expenses through the use of a comprehensive risk management plan.

*Speaker(s): Ray Hauser, Partner, Scariano, Himes, & Petrarca, CHTD, Chicago Heights, IL
John M. Izzo, Partner, Scariano, Himes, & Petrarca, CHTD, Chicago Heights, IL*

Thursday, 5/6/2004

10:15 am - 11:15 am

Special Education: Administration & Finance (FRM) Committee - Special Education Funding

Turquoise A/B (80)

For decades, special education in Illinois has been a major cost of schools. There is always a battle over providing appropriate services for disabled children without breaking the budget. This program will provide an understanding of all special education funding and the issues that control them. It will review all funds, whether local, state, or federal, and what can be done to maximize it. It will also try to

take out the crystal ball and give some insights into the immediate future of special education funding to help you plan in your district.

Speaker(s): Richard E. Kraft, Comptroller, Black Hawk Area Spec. Ed. , East Moline, IL

Thursday, 5/6/2004

10:15 am - 11:15 am

Accounting, Auditing & Financial Reporting (FRM) Committee - MD&A: Focus on Comparative Data

Broadway C (100)

Many of you have implemented GASB 34 and prepared your Management Discussion and Analysis (MD&A) section of the report. You may have chosen not to prepare the required comparative financial information in the first year of implementation. However, comparative financial information is required after the first year of implementation. Learn what comparative information is required to be presented and how to obtain that information. We will also evaluate various examples of the MD&A and see techniques to assist in preparing the information. This session will also look into what types of comparisons can be made in the MD&A in the first year of implementation.

Speaker(s): Bert G. Nuehring, Partner, PTW & Co. , Oak Brook, IL

Thursday, 5/6/2004

10:15 am - 11:15 am

Maintenance & Operations (FM) Committee - Facility Breakfast Forum (begins 9:00 am)

Salon V (140)

Open forum discussion with Facilities and Buildings and Grounds Supervisors and Directors. A chance to meet your neighbors, share information and solutions. Have a cup of coffee and a roll. Share what you are doing. Share a problem. Perhaps you will find a solution.

*Speaker(s): Grant L. Sabo, Dir./Facilities & Transportation, Berkeley SD 87, Berkeley, IL
Joseph Bettuzzi, Dir./Buildings & Grounds, Culver School 71, Niles, IL*

Thursday, 5/6/2004

10:15 am - 11:15 am

Principles of School Finance (FRM) Committee - School Finance Revenues for the Novice (begins 9:00 am)

Ruby (80)

This session is designed for the new board member, superintendent or business manager. The panelists will discuss the budget and levy cycles, property taxes, the impact of tax caps, state aid, and other major revenue sources.

*Speaker(s): Edward J. Hoster, Business Manager/Treasurer, Hinsdale Twp. HSD 86, Hinsdale, IL
Cheryl Crates, Adjunct Professor, Northern Illinois University, Barrington, IL*

Thursday, 5/6/2004

10:15 am - 11:15 am

Cash Management, Investments & Debt Management (FRM) Committee - Cash Flow Borrowing (Part II) (Part I Thurs. 9:00 am)

Broadway A (100)

Illinois school districts continue to experience financial challenges – expenditures outpace revenues, county treasurers delay property tax distributions, tax caps limit revenue growth – all of these and other issues may require a district to consider short-term, cash flow borrowing, which can be an opportunity for your District to get through these situations. Learn how your District can take

advantage of this financing mechanism.

The presenters will accomplish the following at its presentation:

- a. Provide situations in which short-term borrowing makes the most sense for your District.
- b. Explain the documentation and processes required to satisfy bond counsel.
- c. Outline the factors a rating agency considers when rating cash flow borrowing.
- d. Present current market conditions for short-term debt.

*Speaker(s): Ivan Samstein, Assistant Vice Pres./Analyst, Moody's Investors Service , Chicago, IL
Eleanor Lipinski, Vice President, Moody's Investors Service , Chicago, IL
Lynda K. Given, Partner, Chapman and Cutler , Chicago, IL
Tammie S. Beckwith Schallmo, V.P./Public Finance, LaSalle Capital Markets , Chicago, IL*

Thursday, 5/6/2004

11:30 am - 12:00 pm

- Annual Business Meeting of the Association

Salon VI (140)

Thursday, 5/6/2004

12:00 pm - 1:30 pm

- Lunch

Mega Center

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Legal Issues (EE) Committee - Legal Updates for School Business Officials

Salon II (300)

Laugh and learn at this annual school law review of the new legal requirements, rulings and cases involving public schools in Illinois and in the country. Presented by two entertaining, informative and popular school attorneys.

*Speaker(s): G. Robb Cooper, Partner, Ottosen Trevarthen Britz Kelly & Cooper, Ltd. , Wheaton, IL
A. Lynn Himes, Partner, Scariano, Himes, & Petrarca, CHTD , Chicago, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Technology for School Finance Operations (FRM) Committee - The Paperless Office

Ben Hogan (50)

A discussion on the benefits of document imaging and how it can save your district time, space and money. Topics also include document security, data/system integration, archiving and compliance with State and Federal Regulations.

Speaker(s): Adam Newton, Education Team Leader, Digital Paper Solutions , Westmont, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Legal Issues (EE) Committee - Policy, Procedures and Practices - Check Your Alignment! - Part I (Part II 3:15 pm)

Broadway C (100)

Does board policy provide you clear direction? Do your administrative procedures align with board policy? Does what's actually happening in the district align with both? Consider why this is important for finance, investment, facilities rental, personnel and other important issues.

*Speaker(s): Cathy A. Talbert, Senior Director of Policy Services, Illinois Association of School Boards, Lombard, IL
Cynthia L. Heidorn, Superintendent, Gower SD 62, Willowbrook, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Public Policy & Intergovernmental Relations (EE) Committee - Legislative Tools

Salon V (140)

Communicating to your legislators - Why and How

*Speaker(s): Calvin C. Jackson, Legislative & Professional Development Consultant, Illinois ASBO, Fairbury, IL
Dion Smith, Deputy Chief Financial Officer, Chicago Public SD 299, Chicago, IL
Todd R. Drafall, Dir./Finance, Aurora West SD 129, Aurora, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Personnel & Benefits Administration (HRM) - Bargaining Health Care Issues in Today's Labor Environment

Salon IV (140)

A good public sector job used to mean that you would never become a rich person from your salary, but you would always have good health insurance at no cost to you or your family. Times have changed. An older workforce, along with skyrocketing costs for standard insurance and drugs, forces all employers to look at how to continue affordable health insurance for their employees. Nowhere is that experience greater than in the public sector. Not only does the public entity face the challenge of keeping benefits up and costs down, but it often must bargain with powerful unions who represent employees who still believe that health insurance for themselves and their families should be available at no cost to them.

What happens at the bargaining table over health benefits will likely have tremendous impact on the employer's bottom line. So, it is important in today's labor environment that both the union and the employer understand that health insurance is no longer a "fringe benefit", but a costly benefit. In this interactive session we will discuss strategies for bargaining this benefit to allow for a fair sharing of costs now as well as creating a strategy to address future changes in health care costs and trends.

Speaker(s): Don Anderson, Attorney, Ancel, Glink, Diamond, Bush, DiCianni & Rolek, P.C., Chicago, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Communications (IM) Committee - PowerPoint

Preservation Hall A - LAB

Have a need to get your point across? Can't figure out how to get that chart into PowerPoint? Come to this session to get these and many other questions you have with PowerPoint answered.

Speaker(s): John A. Gibson, Business Manager, Riverside-Brookfield SD 208, Riverside, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Special Education: Administration & Finance (FRM) Committee - Computerized IEP in Data Management

Turquoise A/B (80)

Participants will obtain information regarding a total solution to special education data management. Panelists will discuss how facts information can be tracked. Discussion will cover software that prepares the 14-7.02a and 14-7.03 claim information for submission to the State. Other topics include tuition and invoice billing, personnel management and preparation of the 14-13.01 claim. Panelists will discuss how a comprehensive database works in relation to Medicaid data collection, the IEP, State Mandated Forms, and how it can interface with any General Student Management System or EDWIN. Software characteristics and user friendliness will be reviewed. In addition to a review of software helpful to business officials management of special education data, a brief review of NCLB information management and General Student Data Management (attendance, grading, scheduling, etc.) will be discussed.

*Speaker(s): Arthur R. Keller, President, Customized Relational Technology, Inc., Kankakee, IL
Raymond Lechner, Director of Special Education, Wilmette School District 39, Wilmette, IL
Kenneth Randle, Special Education Administration Consultant, Private Contractor, Lake Barrington, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Budgeting & Financial Planning (FRM) Committee - Strategies For Successful Tax Rate Referenda

Broadway A (100)

Planning for a tax rate referendum requires convincing the Board of the need for more revenues and a reading of what the public is thinking. Business managers and a financial consultant will discuss successful strategies for both of these critical steps to improve the chances for a "yes" vote on a tax rate increase. Tax rate increase not for you? Consider other types of referenda that boost revenues.

Speaker(s): Elizabeth M. Hennessy, Principal, William Blair & Company, L.L.C., Chicago, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Accounting, Auditing & Financial Reporting (FRM) Committee - The GASB & AICPA (American Institute of Certified Public Accountants) Never Quit: More New Pronouncements That Affect 2004 Audits

Salon III (140)

This session will focus on the new fraud auditing standard and how it will affect this year's audit. You will also learn about the new GASB standard on affiliated organizations which could potentially bring foundations, booster clubs, PTO/PTA's into the district's audit report. Other new developments will also be discussed.

Speaker(s): Andrew L. Mace, Vice President, William F. Gurrie & Co., Ltd., Oak Brook, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Cash Management, Investments & Debt Management (FRM) Committee - Preventing Check and ACH Fraud: How to Protect Your Schools

Sapphire (50)

Fraud is rapidly on the increase. According to the Comptroller of the Currency, more than 1.2 million fraudulent checks are written every day; that translates to more than 13 each second! Losses this year from fraudulent checks are estimated to exceed \$20 billion. Is electronic fraud next? What is your district doing to guard itself against fraud?

This session will update and educate you on preventative measures your district can employ to protect itself from external and internal threats of fraud.

*Speaker(s): Aimee Briles, V.P./Institutional Banking, Oak Brook Bank, Oak Brook, IL
Thomas Ormseth, V. P./Treasury Mgt. Services, Oak Brook Bank, Oak Brook, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Maintenance & Operations (FM) Committee - Avoid the Claims!! Workman's Comp - Steps to Safety

Coral (50)

Safety measures to reduce injuries and avoid claims. Proper procedures once an injury occurs to reduce payments. "Lessons from Losses" discussion.

*Speaker(s): Michael J. Stapleton, Facilities Consultant, Service Management Assist, Inc., Bolingbrook, IL
Cynthia De Cola, Lawyer, Law Offices of Hodges, Loizzi, Eisenhammer, Rodick, & Kohn, Arlington Heights, IL
Anthony M. Sostak, Vice Pres./Marketing & Operations, SBM Maintenance Contractors, Inc., Addison, IL
Scott James, Senior Loss Control Representative, Indiana Insurance, Lisle, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Personnel & Benefits Administration (HRM) - Group Long Term Care

Broadway B (100)

The one voluntary benefit you need to offer when your staff's welfare matters.

Speaker(s): Lena Borski, Vice President, Long Term Care Division, GCG Financial, Inc., Bannockburn, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Maintenance & Operations (FM) Committee - Affordable Facility Management

Jade (50)

An Exploration into Web Based Facility Management Software Services via the Internet

Explore the increasing need for facility information and data, the crucial role it plays in the budgeting and planning of today's school district. The benefits and requirements of systems, how to determine your district's needs, and a review of marketplace offerings, and how to make comparisons between offerings.

Speaker(s): John P. Conlon, Owner, CPC, Inc., Carol Stream, IL

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Principles of School Finance (FRM) Committee - School Finance Expenditures and Alternative Borrowing

Ruby (80)

This session will focus on expenditures and issues related to expenditure planning and expenditure control. We have designed this session to focus on the role of business administrator to help the school finance novice see many of the relationships between the accounting for, and reporting of, expenditures. We will include a brief discussion of the Real Estate Tax Levy, and the current basic accounting concepts for Funds, as well as the requirements of the Illinois Program Accounting Manual. We will discuss Budgets, including basic Budget Planning, Budgetary Controls and the Legal Budget. There will be a discussion of Administrative Cost Caps, Financial Reporting and Annual Audit requirements. We will also mention Tort expenditures, features of the Bond and Interest Fund, including legal debt limits, and certain operations of the Working Cash Fund.

*Speaker(s): Cheryl Crates, Adjunct Professor, Northern Illinois University, Barrington, IL
Susan L. Shepard, Business Office Manager/Treasurer, Comm. Unit Sch. Dist. 300,
Carpentersville, IL*

Thursday, 5/6/2004

2:00 pm - 3:00 pm

Risk Management (AS) Committee - A Win - Win Solution to Address Healthcare Costs

Salon VI (140)

This session will provide you with a look at a unique way that Freeport addressed the cost of healthcare.

Background: Freeport Health Network (FHN), the community healthcare provider in Freeport, Illinois, offers a birds' eye view into a very partnership-oriented health plan that has helped to keep costs steady in their northwest Illinois service area.

FHN is the parent company of the Northern Illinois Health Plan (NIHP), which is the result of a concept that was pulled together by three principal players: 1) local private and 2) public businesses and 3) medical community leaders in 1989. The plan is based on the belief that healthcare is a local issue, largely provided in a local setting, despite the fact that national mandates do affect it.

In not only recognizing but embracing this concept, FHN (a not-for-profit healthcare organization) spearheaded the development of the NIHP, a symbiotic relationship between healthcare providers and the business community. Businesses needed a strong provider community so that healthcare services were available for their employees, and healthcare providers needed sound businesses to help fund the cost of healthcare services.

*Speaker(s): Dennis Hamilton, Chief Executive Officer, FHN (Freeport Health Network), Freeport, IL
Michael Perry, M.D., Executive VP & Chief Physician Officer, FHN (Freeport Health Network)
, Freeport, IL
Tim Mickel, Consultant, FHN (Freeport Health Network), Freeport, IL
Peggy Fuller, Director, Northern Illinois Health Plan, Freeport, IL*

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Legal Issues (EE) Committee - Policy, Procedures and Practices - Check Your Alignment! - Part II (Part I 2:00 pm)

Broadway C (100)

Does board policy provide you clear direction? Do your administrative procedures align with board policy? Does what's actually happening in the district align with both? Consider why this is important for finance, investment, facilities rental, personnel and other important issues.

Speaker(s): Cathy A. Talbert, Senior Director of Policy Services, Illinois Association of School Boards, Lombard, IL

Cynthia L. Heidorn, Superintendent, Gower SD 62, Willowbrook, IL

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Legal Issues (EE) Committee - Labor Relations During Times of Fiscal Constraint

Ruby (80)

Are you currently in negotiations and looking for creative ideas to keep your costs down? Are you facing financial troubles and dreading negotiations in the fall? Are you confused about new legislation that could impede your negotiations? Are you looking for inexpensive "win-win" solutions to bring back to your negotiations team?

Join us for a rousing discussion on Labor Relations During Times of Fiscal Constraint. Our distinguished panel will bring hints, tips and solutions to this timely session. To round out the session, bring your comments, questions and solutions to share.

*Speaker(s): Todd Hayden, Attorney, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL
Joe Perkoski, Attorney, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL*

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Management Information Systems (IM) Committee - Advanced Excel

Preservation Hall A - LAB

Do you need a shortcut to calculate the levy? Do you need some help automating accounting tasks? Come to this session to become more advanced using formulas in Excel.

Speaker(s): Thomas J. Zelek, Jr., Business Manager, Elmwood Park CUSD 401, Elmwood Park, IL

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Budgeting & Financial Planning (FRM) Committee - Indicators of Financial Health

Sapphire (50)

In this session, analysts from two credit rating agencies and an independent public finance advisor will discuss various indicators of financial health for school districts. The panelist will provide ideas on how to maintain financial control of your district. They will also comment on "The School District Financial Profile" and discuss other ways for comparing school districts.

*Speaker(s): Ivan Samstein, Assistant Vice Pres./Analyst, Moody's Investors Service, Chicago, IL
John Kenward, Director, Standard & Poor's, Chicago, IL
Steve H. Larson, Sr. Vice President/Director, Ehlers & Associates, Inc., Naperville, IL*

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Cash Management, Investments & Debt Management (FRM) Committee - Roundtable With Investors Who Buy Your Bond Issues

Turquoise A/B (80)

Get the lowest interest rate on your bond issues by attracting the most bond investors. Listen and talk directly to three bond investors to find out what they look for when they buy municipal bonds.

*Speaker(s): Joe Piraro, Vice President/Fund Manager, Van Kampen Funds,,
George Selby, Partner/Fund Manager, Harris Investment,,
Susan Carr,, McDonnell & Company,,*

Thursday, 5/6/2004

3:15 pm - 5:00 pm

Planning & Construction (FM) Committee - How to Hire and What to Expect From Your Design and Construction Professionals

Coral (50)

Assembling a project team is not unlike arranging a marriage (albeit short term) with all the communication and relationship issues that "marriage" entails. To obtain the best synergy between you and your design and construction professionals, you must first hire a team that works well together and then effectively manage them such that the best of their skills are brought to bear on your project. This program explores the "how to's" of hiring your design and construction professionals, what you should reasonably expect from them and how to ensure that everyone stays "on task" to your benefit.

*Speaker(s): David J. Binkley, Sr. Vice President/Management, Henry Bros. Construction Mgmt. Servs., Inc., Hickory Hills, IL
Richard P. Cozzi AIA, Principal, ARCON Associates, Inc., Lombard, IL*

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Personnel & Benefits Administration (HRM) Committee - Preserving Your Employee Benefits: Key Strategies for Effective 403(b) Compliance

Jade (50)

This session will address the following questions: "What does the IRS look for?" "What are your Fiduciary Responsibilities?" "What small steps can you take that will yield big compliance results?"

Speaker(s): Richard Turner, Vice President and Associate General Council, AIG/VALIC, Peoria, IL

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Maintenance & Operations (FM) Committee - Lessons Learned From Corporate America - How Illinois School Districts Can Drive Down Their Indirect Costs and Put More Money Back Into the Classroom

Broadway A (100)

By applying the best practices in property management service delivery developed in the institutional and commercial sectors, higher education owners are realizing real savings. These same practices are easily transferable to K-12 school districts. This session presents, as a case study, an accountable and entrepreneurial approach to using physical assets to bring dollars back to the core work of educating children. The approach is a broad-brush method to identify, reduce and manage the indirect cost of education by focusing on the "magnificent seven" areas.

*Speaker(s): Gary V. Ey, K-12 Educational Consultant, Wight & Company, Downers Grove, IL
John M. Krieger, President of Campus inDirects, Wight and Co., Chicago, IL*

Thursday, 5/6/2004

3:15 pm - 4:45 pm

Public Policy & Intergovernmental Relations (EE) Committee - Mandate Shortfall Relief Levies: Powerful New Tools to Pay for Underfunded Mandates Without Debt

Broadway B (100)

How are you finding the \$1-2 million or more in local funds, tax-capped or not, to pay for your special education funding deficit each year? Depleting cash reserves? Cutting everything "nonessential" to divert the cash saved? Taking on new debt? Mandates without funding, or enough funding, force schools to make up the difference "somehow" with local revenue. Tax caps add to the problem of finding local revenue to make up the shortfall. New tools-Mandate Shortfall Relief Levies-are under consideration by the General Assembly for use by schools beginning July 1, 2004 (HB 4774). The two mandates initially covered are among the most costly: special education and student transportation. Learn how deficit spending and borrowing to cover these mandates can be virtually eliminated. Learn how to convert debt instrument dollars to revenue dollars in your district. These new tools, if they become available, promise a new era in local school finance. No bill before the General Assembly will do more for helping school finance than will HB 4774.

*Speaker(s): Edward C. Wahl, Retired, IASBO Emeritus II, Hazel Crest, IL
Allan T. Smigiel, Asst. Supt./Business & Operations, Ridgeland SD 122, Oak Lawn, IL*

Thursday, 5/6/2004

4:30 pm - 6:00 pm

- Hospitality

New Orleans (300)

Wednesday, 5/6/2004

6:00 pm - 9:30 pm

- Recognition Banquet & Entertainment

St. Charles Ballroom

Thursday, 5/6/2004

9:30 pm - 12:00 am

- Hospitality, DJ and Caricature Artists

New Orleans (300)

Friday, 5/7/2004

8:00 am - 8:30 am

- Complimentary Breakfast

Salons I, III, IV

*Speaker(s): Anne Miller, Executive Director, ASBO International, Reston, VA
David Wood, Asst. Chief Deputy, Operations & Finance Center, Illinois State Board of Education, Springfield, IL*

Friday, 5/7/2004

8:30 am - 9:00 am

Public Policy & Intergovernmental Relations (EE) Committee - Updates from the Illinois State Board of Education

Salons I, III, IV (500)

Speaker(s): David Wood, Asst. Chief Deputy/Operations & Finance Center, IL State Board of Education, Springfield, IL

Friday, 5/7/2004

9:00 am - 9:30 am

Public Policy & Intergovernmental Relations (EE) Committee - Legislative Update

Salons I, III, IV (500)

Speaker(s): Calvin C. Jackson, Legislative & PD Consultant, Illinois ASBO, Fairbury, IL

Friday, 5/7/2004

9:30 am - 10:30 am

- Closing General Session

Salons I, III, IV

You can be the Grand Prize winner today if you can answer these questions: Where are you going? How are you going to get there? What will make you happy? Bob Eubanks' inspirational message will not only motivate you, it will help show you the way to personal and business success. For 22 years Bob wrote television history as the host of the incredibly successful television show, The Newlywed Game. Join us in welcoming Bob!

Speaker(s): Bob Eubanks

Friday, 5/7/2004

10:30 am - 11:00 am

- 2003-2004 & 2004-2005 Board of Directors Meeting

Turquoise A/B (80)

Friday, 5/7/2004

11:15 am - 2:30 pm

- FIAC Meeting

Ruby (80)