

MAY 4-6, 2005

Pheasant Run Resort
St. Charles, Illinois

54th Annual Conference and Exhibitions

Program & Exhibition Guide



Illinois Association of School Business Officials
Building Tomorrow's Traditions Today

I Plan to Attend		
Wednesday	8:00 am - 8:30 am	Program for New Member - <i>Salon VI</i>
	9:00 am - 10:45 am	Opening General Session - <i>Salons III, IV</i>
	11:00 am - 12:00 pm	Breakout Sessions - <i>pages 11-14</i> (pick one):
	12:00 pm - 4:00 pm	Exhibits Open - <i>Mega Center</i> (Lunch served in Exhibit Hall) - Play the Spot Game, Get a Massage/Shoe Shine, Check Your Email
	2:00 pm - 3:00 pm	Breakout Sessions - <i>pages 14-17</i> (Pick one):
	3:15 pm - 4:45 pm	Breakout Sessions - <i>pages 17-20</i> (Pick one):
	3:15 pm - 4:45 pm	Goldmine Table Sessions - <i>pages 20-22</i> :
	5:00 pm - 6:00 pm	Hospitality - <i>New Orleans Ballroom</i>
8:00 pm - 11:30 pm	Casino Night Mixer - <i>St. Charles Ballroom (Salons)</i>	
Thursday	6:00 am - 7:00 am	5 KM Run & Walk - <i>Golf Pro Shop (Meet at 5:45 am)</i>
	7:30 am - 9:00 am	Professional Development Committees' Planning/Meeting Breakfast - <i>Salons III, IV</i>
	9:00 am - 9:50 am	Annual Service Associate Business Meeting - <i>Salon II</i>
	9:00 am - 11:15 am	Facility Breakfast Forum - <i>New Orleans</i>
	9:00 am - 10:00 am	Breakout Sessions - <i>pages 26-30</i> (Pick one):
	10:00 am - 3:00 pm	Exhibits Open - <i>Mega Center</i> (Lunch served in Exhibit Hall) - Play the Spot Game, Get a Massage/Shoe Shine, Check Your Email
	10:15 am - 11:15 am	Breakout Sessions - <i>pages 30-33</i> (Pick one):
	11:30 am - 12:00 pm	Annual Business Meeting of the Association - <i>Salon II</i>
	2:00 pm - 3:00 pm	Breakout Sessions - <i>pages 34-37</i> (Pick one):
	3:15 pm - 4:45 pm	Breakout Sessions - <i>pages 37-39</i> (Pick one):
	5:00 pm - 6:00 pm	Hospitality - <i>New Orleans Ballroom</i>
	6:00 pm - 9:30 pm	Recognition Banquet & Entertainment - <i>St. Charles Ballroom (Salons)</i>
	9:30 pm - 12:00 am	Hospitality, DJ. & Caricature Artists - <i>St. Charles Ballroom (Salons)</i>
Friday	8:00 am - 8:30 am	Breakfast - <i>Salons III, IV</i>
	8:30 am - 9:00 am	Updates from the Illinois State Board of Education - <i>Salons III, IV</i>
	9:00 am - 9:30 am	Legislative Update - <i>Salons III, IV</i>
	9:30 am - 10:30 am	Closing General Session - <i>Salons III, IV</i>

Tuesday Pre-Conference Seminars

Schedule of Events: Tuesday, May 3, 2005

7:30 am - 4:00 pm	Pre-Conference Seminar - <i>Salon V</i> <i>The 21 Indispensable Qualities of a Leader (Lunch in Atrium)</i>
8:00 am - 12:00 pm	Pre-Conference Seminar - <i>Salon VI</i> <i>What's Up With Tort?</i>
6:30 am - 5:00 pm	Golf - <i>Mill Creek Golf Club, Geneva, IL</i> Morning & Afternoon Scrambles
4:00 pm - 8:00 pm	Exhibitors Set Up - <i>Mega Center, Exhibit Hall</i> Registration Desk Open
5:30 pm - 6:30 pm	Hospitality - <i>Mill Creek Golf Club, Geneva, IL</i>
6:30 pm - 8:30 pm	Buffet Dinner & Awarding of Golf Prizes - <i>Mill Creek Golf Club, Geneva, IL</i> Illinois ASBO Members and Conference Registrants only

6:30 am - 5:00 pm----- **Golf Outing**
Mill Creek Golf Club

7:30 am - 4:00 pm----- **Pre-Conference Seminar**
Salon V

The 21 Indispensable Qualities of a Leader

An Approved Required Strand for Illinois Administrators' Academy Credit

What makes people want to follow a leader? Why do people reluctantly comply with one leader while passionately following another to the ends of the earth? What separates leadership theorists from successful leaders who lead effectively in the real world? The answer lies in the character qualities of the individual person. The 21 Indispensable Qualities of a Leader will help you recognize, develop, and refine the personal characteristics needed to be a truly effective leader. Everything rises and falls on leadership. And leadership truly develops from the inside out. If you can become the leader you ought to be on the inside, you will be able to become the leader you want to be on the outside. People will want to follow you. And when that happens, you'll be able to tackle anything in this world. The 21 qualities are: 1) Character, 2) Charisma, 3) Commitment, 4) Communication, 5) Competence, 6) Courage, 7) Discernment, 8) Focus, 9) Generosity, 10) Initiative, 11) Listening, 12) Passion, 13) Positive Attitude, 14) Problem-Solving, 15) Relationships, 16) Responsibility, 17) Security, 18) Self-Discipline, 19) Servanthood, 20) Teachability, and 21) Vision.

Speaker(s): Calvin C. Jackson, Legislative Liaison/Prof. Dev. Consultant, Illinois ASBO, Fairbury, IL

8:00 am - 12:00 pm ----- **Pre-Conference Seminar**
Salon VI

What's Up With Tort?

Topics to be covered:

- Risk Management Plans
- Tort Funds Reported on the Annual Financial Report (45 min. Debby Vespa, ISBE)
- What You Can and Cannot Do With Your Tort Levy
- Others ...

Speaker(s): John M. Izzo, Partner, Scariano, Himes, & Petrarca, CHTD, Chicago Heights, IL
Ray Hauser, Partner, Scariano, Himes, & Petrarca, CHTD, Chicago Heights, IL
Debby I. Vespa, Division Administrator, IL State Board of Education, Springfield, IL

4:00 pm - 8:00 pm ----- **Exhibitors Set Up**
Mega Center, Exhibit Hall

4:00 pm - 8:00 pm ----- **Registration Desk Open**
Mega Center, Exhibit Hall

5:30 pm ----- **Post Golf Hospitality & Dinner**
Mill Creek Golf Club

Wednesday Meeting-at-a-Glance

Meeting-at-a-Glance Schedule: Wednesday, May 4, 2005						
7:00 am - 5:00 pm	Registration Desk Open - <i>Mega Center</i>					
7:00 am - 8:00 am	Board of Directors' Breakfast Meeting - <i>Turquoise A/B</i>					
7:00 am - 9:00 am	Welcome Reception - <i>Atrium</i>					
7:00 am - 11:30 am	Exhibitors Set Up - <i>Mega Center, Exhibit Hall</i>					
8:00 am - 8:30 am	Program for New Members - <i>Salon VI</i>					
9:00 am - 9:50 am	Exhibit Hall Presentation: Winning Strategies for Successful Exhibiting - <i>Mega Center, Exhibit Hall (in Tent)</i>					
9:00 am - 10:45 am	Opening General Session - <i>Salons III, IV</i>					
11:00 am - 12:00 pm	<i>Breakout Sessions</i>					
	Accounting, Auditing & Financial Reporting Banking RFP's - How to Save Thousands Annually Without Cutting Programs or Staff by Bidding Out Banking Services <i>Sapphire</i>	Budgeting & Financial Planning Financial Projections Made Easy <i>Broadway B</i>	Cash Mgmt, Investments & Debt Mgmt How You Can Protect Your District From Financial Fraud (Check & ACH Fraud) <i>Jade</i>	Cash Mgmt, Investments & Debt Mgmt The Merits of Competitive and Negotiated Bond Sales <i>Arnold Palmer</i>	Food Service Mission Impossible: Feeding Kids Better for Less Preservation Hall A	Legal Issues Referendum Question Language <i>Broadway C</i>
12:00 pm - 4:00 pm	Exhibits Open - <i>Mega Center, Exhibit Hall (free to all Support Personnel - Pre-registration required)</i>					
12:00 pm - 1:30 pm	Lunch - <i>Mega Center, Exhibit Hall</i>					
2:00 pm - 3:00 pm	<i>Breakout Sessions</i>					
	Accounting, Auditing & Financial Reporting Internal Controls for Schools: More Benefit, Less Cost <i>Coral</i>	Budgeting & Financial Planning Budgeting for Energy Costs <i>Jade</i>	Legal Issues The 2005 Education Workplace: Labor Trends and FLSA Issues <i>Salon V</i>	Personnel, Human Relations, Benefits Admin., Labor Rel. & Employment Agreements A Comprehensive Guide to the 403(b) New Regulations and Guidelines <i>Salon VI</i>	Principles of School Finance Communicating Financial Information With Integrity to Your Board <i>Broadway B</i>	
3:15 pm - 4:45 pm	<i>Breakout Sessions</i>					
	Accounting, Auditing & Financial Reporting The Evolving AFR - Looking Towards Better Comparability <i>Broadway B</i>	Budgeting & Financial Planning Budgeting and Expenditure Control - Solutions to the Big Issues <i>Salon V</i>	Cash Mgmt, Investments & Debt Mgmt Are Variable Rate Bonds Right for My School District? <i>Jade</i>	Legal Issues IDEA Reauthorization 2004 and NCLB <i>Broadway A</i>	Legal Issues What Does Your School Attorney Think of You? <i>Salon VI</i>	
3:15 pm - 4:45 pm	<i>Gold Mine Sessions - Salons III, IV (see pages 20 through 22 for offerings)</i>					
3:15 pm - 4:45 pm	Super Sectional: Update from the State Superintendent - <i>Salon II</i>					
5:00 pm - 6:00 pm	Hospitality - <i>New Orleans</i>					
8:00 pm - 11:30 pm	Mixer: Casino Night - <i>St. Charles Ballroom (Salons)</i>					

Meeting-at-a-Glance Schedule: Wednesday, May 4, 2005

Registration Desk Open - <i>Mega Center</i>						
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Opening General Session - <i>Salons III, IV</i>						
<i>Breakout Sessions</i>						
Personnel, Human Relations, Benefits Admin., Labor Rel. & Employment Agreements TRS Updates <i>Ruby</i>	Professional Development Dump Those Filing Cabinets: The Digital Solution <i>Turquoise A/B</i>	Public Policy & Intergovernmental Relations ERO Update and Other Pensions Issues <i>Salon VI</i>	Purchasing What is Central Management Services (CMS) & How Does it Help Schools? <i>Coral</i>	Risk Management Cyber Risk Management <i>Salon V</i>	Risk Management Environmental Update <i>Salon II</i>	Strategic Plan. & Instructional Support & Eval. Programs Wireless LANS & WANS <i>Broadway A</i>
Exhibits Open - <i>Mega Center, Exhibit Hall (free to all Support Personnel - Pre-registration required)</i>						
Lunch - <i>Mega Center, Exhibit Hall</i>						
<i>Breakout Sessions</i>						
Professional Development Structuring Work Groups - Using More than Just Intuition <i>Turquoise A/B</i>	Public Policy & Intergovernmental Relations Administrative Certification <i>Broadway A</i>	Public Policy & Intergovernmental Relations HB & SB 750 <i>Salon II</i>	Risk Management Annual Tort Update <i>Sapphire</i>	Risk Management Consumer-Directed Healthcare - Is It a Solution for Illinois Schools? <i>Broadway C</i>	Technology for School Finance Operations Digitizing Student Records for Efficiency and Safety Utilizing Current Assets <i>Preservation Hall A</i>	Technology for School Finance Operations Selecting Administrative Software <i>Ruby</i>
<i>Breakout Sessions</i>						
Maintenance & Operations Infrared Thermography and the Detection of Moisture in Roofing Systems <i>Sapphire</i>	Planning & Construction Lessons Learned in Stretching Your Capital Improvement Dollars <i>Turquoise A/B</i>	Professional Development Alternative Certification: The Chief School Business Officials' Pathway to Superintendency <i>Ruby</i>	Professional Development Ethics Law Update <i>Broadway C</i>	Technology for School Finance Operations LAB: Advanced Microsoft Word Office 2000 <i>Skybox 1 & 2</i>		
<i>Gold Mine Sessions - Salons III, IV (see pages 20 through 22 for offerings)</i>						
Super Sectional: Update from the State Superintendent - <i>Salon II</i>						
Hospitality - <i>New Orleans</i>						
Mixer: Casino Night - <i>St. Charles Ballroom (Salons)</i>						

Wednesday Events

7:00 am - 8:00 am ----- **Board of Directors' Breakfast Meeting**
Turquoise A/B

7:00 am - 9:00 am ----- **Welcome Reception**
Atrium

7:00 am - 11:30 am ----- **Exhibitors Setting Up**
Mega Center, Exhibit Hall

7:00 am - 5:00 pm ----- **Registration Desk Open**
Mega Center

8:00 am - 8:30 am ----- **Program for New Members**
Salon VI

For those who may be new to the Association and/or attending our Annual Conference for the first time, be sure to attend this session with Executive Director R. E. Everett. He will show you how to reap the benefits of this great Association and maximize your participation in this conference!

9:00 am - 10:45 am ----- **Opening General Session**
Salons III, IV

"You Cannot Do This Alone" Jamie Vollmer, a former attorney and businessman, was once a harsh critic of public education, however, he is now an articulate champion of America's public schools helping school districts build professional morale and increase community support. He has the wonderful ability to discuss the hard issues and yet leave his audiences with a positive, hopeful message regarding the future.

In addition to hearing a great "kick off" presentation, we will be recognizing those individuals who have acted in leadership roles in the Professional Development Committees and Regional Organizations, along with others in the areas of school business management. Join us in welcoming Jamie Vollmer and honoring our colleagues!

9:00 am - 9:50 am ----- **Exhibit Hall Presentation**
Exhibit Hall (in Tent)

"Winning Strategies for Successful Exhibiting"

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.

11:00 am - 12:00 pm ----- Breakout Sessions

Accounting, Auditing & Financial Reporting (FRM) Committee Banking RFP's - How to Save Thousands Annually Without Cutting Programs or Staff by Bidding Out Banking Services

Sapphire

Even "free banking" packages are full of hidden costs that may not be evident at first glance. This presentation will not only take the mystery out of the "black box" of banking charges and balance requirements but will also show you how one district, with the help of a banking and treasury services consultant, was able to increase banking service levels and save thousands of dollars per year on everything from account activity fees to investment opportunity. You'll get pointers on ways to set up a banking RFP that insures an apples-to-apples comparison of services and costs.

*Speaker(s): Martin T. McConahay, Administrator/Finance & Operations, Wilmette Elem. SD 39, Wilmette, IL
Kimberly M. Feeney, Vice President, Bank of America, Chicago, IL
Jackie Schimizzi, Treasury Consultant, Banking and Treasury Services, Chicago, IL*

Moderator: Mary B. Kalou, Asst. Supt./Business, Arlington Heights SD 25, Arlington Heights, IL

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

Broadway B

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

Moderator: William J. Thompson, Dir./Facilities Management, Lockport Twp. HSD 205, Lockport, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee How You Can Protect Your District From Financial Fraud (Check & ACH Fraud)

Jade

What systems does your District have in place to prevent becoming a victim of fraud? Are you confident that your controls will be effective? 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. At the same time, ACH fraud is rapidly on the increase and quickly becoming a significant threat. This session will update you on the different options that your District can take advantage of to minimize your risk from external and internal threats of both check and ACH fraud.

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

Moderator: Aimee L. Briles, V.P./Institutional Banking, Oak Brook Bank, Oak Brook, IL

Wednesday Events

11:00 am - 12:00 pm ----- Breakout Sessions

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee The Merits of Competitive and Negotiated Bond Sales
Arnold Palmer

Competitive Versus Negotiated Bond Sales. Many business officials may be new to the management of school business affairs. Whether you are new or an old hand, you will almost certainly need to issue debt for new buildings, life/safety improvements, technology upgrades or for cash shortages. How should your District undertake this process of selling bonds? There are essentially two methods - through the sale of bonds on competitive and negotiated basis. At this seminar, we will explore the process or steps for the sale of bonds or other forms of indebtedness for competitive or negotiated sales. Also, we shall offer an overview of competitive vs. negotiated bond sales in the bond market. This will include a summary of the advantages and disadvantages of these two types of sales. Come join us for another lively discussion on this topic of how best to offer the bonds of your district for sale.

*Speaker(s): Ogden Kniffin, Jr., Vice President, Legg Mason Wood Walker, Inc., Chicago, IL
John V. Repsholdt, Financial Advisor, Ehlers & Associates, Inc., Naperville, IL*

Moderator: Darrell J. Moon, Chief Financial Officer, McHenry CHSD 156, McHenry, IL

Food Service (AS) Committee Mission Impossible: Feeding Kids Better for Less
Preservation Hall A

Discover how membership in a purchasing cooperative can bring your district's nutrition program the best products for the best prices with less work on your part. Joint purchasing relieves you of the logistics and costs of formal bidding and results in proven cash savings.

*Speaker(s): Coletta Hines-Newell, Dir./Food & Nutrition Services, Arlington Heights SD 25, Arlington Heights, IL
Connie Mueller, Dir./Food & Nutrition Services, Bloomington SD 87, Bloomington, IL
Toni Fisher, Dir./Food & Nutrition Services, Evanston Twp. HSD 202, Evanston, IL*

Moderator: Georgeen M. Ibarra, Business Manager, Park Forest Chicago Hgts. SD 163, Park Forest, IL

Legal Issues (EE) Committee Referendum Question Language
Broadway C

This presentation will discuss the language requirements for referendum questions for building purposes and tax rate increases. We will cover the best way to describe your building project to clearly convey the District's intentions to the voters as well as warn of pitfalls from questions that are too specific. We will also discuss tax rate increase questions, the rules regarding the four-year phase-in, and the different interpretations of these rules around the state. Finally, we will discuss referendum questions in context of the District's overall strategic plan and how you can increase your District's chances of getting a "yes" vote.

*Speaker(s): Lynda K. Given, Partner, Chapman and Cutler, LLP, Chicago, IL
Elizabeth M. Hennessy, Principal, William Blair & Company, Chicago, IL*

Moderator: Dean T. Romano, NIU Graduate Student, St. Charles, IL

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee TRS Updates
Ruby

Jeff Proffitt, TRS Employer Services Auditor, will bring you the most recent information from Springfield. He will discuss upcoming changes and what impact they will have on TRS employers. Bring your questions for a lively Q&A session after the presentation!

Speaker(s): Jeff Proffitt, Employer Services Auditor IV, Teachers Retirement System (TRS), Springfield, IL

Moderator: Cheryl Flinn, Business Manager, Ridgewood High School 234, Norridge, IL

11:00 am - 12:00 pm ----- Breakout Sessions

Professional Development (HRM) Committee Dump Those Filing Cabinets: The Digital Solution
Turquoise A/B

Envision what you could do with all that extra office space if only you could get rid of those “space hogging” filing cabinets! Now imagine ease in finding documents in a fraction of the time you now spend looking for them. By utilizing document imaging for archival and document management, you can save office space and increase your efficiency. Come and learn how easy it would be to bring your office into the 21st century.

Speaker(s): Brian A. Boyd, President, Digital Paper Solutions, Inc., Westmont, IL

Moderator: Christine A. Sefcik, Assistant Superintendent, Grant CHSD 124, Fox Lake, IL

Public Policy & Intergovernmental Relations (EE) Committee ERO Update and Other Pensions Issues
Salon VI

ERO is set to expire June 30, 2005. Will it be extended, changed or dropped? Our presenter will sort through the politics and offer his opinion on this issue that has an impact on every school district in Illinois.

Speaker(s): Charles P. Rose, Founding Partner, Franczek Sullivan P.C., Chicago, IL

Moderator: Calvin C. Jackson, Legislative Liaison/Prof. Dev. Consultant, Illinois ASBO, Fairbury, IL

Purchasing (MSM) Committee What is Central Management Services (CMS) & How Does it Help Schools?
Coral

Central Management Services (CMS) provides a broad range of programs and services to state agencies which include school districts, ranging from personnel and employee benefits to management of numerous properties around the state. CMS serves a key role in ensuring that all State of Illinois agencies operate in the most efficient and cost effective manner to best serve the residents of Illinois. It is leading the effort to develop greater efficiencies in the state purchasing system. As the state’s central purchasing authority, the bureau establishes contracts that ensure quality products are obtained at the lowest possible prices. The bureau administers the Joint Purchasing Program, which allows school districts to take advantage of volume discounts by purchasing supplies and equipment from select state contracts. As the state’s fleet manager, the bureau oversees all state vehicle purchases. The state’s fleet consists of some 12,800 vehicles, which are maintained through a network of 20 garage facilities and a motor pool facility in Springfield. The Governor’s Travel Control Board has established discount agreements with hotels, airlines and car rental companies, and administers the state’s corporate charge card program.

The Illinois State Use Program is a national leader in providing both traditional and technology-based employment opportunities for persons with disabilities. The program allows state agencies, including school districts; to purchase goods and services from approved rehabilitation facilities serving persons with disabilities. Agencies have realized considerable savings while receiving high-quality products and services. Through this program, new employment opportunities have been created for more than 25,000 Illinois citizens with disabilities.

Speaker(s): Paul Campbell, Assistant Director, CMS, Chicago, IL

Moderator: Walter J. Korpan, Chief Financial Officer, Round Lake Area CUSD 116, Round Lake, IL

Risk Management (AS) Committee Environmental Update
Salon II

Management of environmental concerns in schools is constantly evolving. Mold, school bus idling, the reemergence of lead and asthma and allergies are issues that have been getting regulatory and media attention. This session will provide an introduction to these and other current environmental topics related to environmental program management in schools.

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

Moderator: James R. Connelly, Asst. Supt./Business, Hinsdale Elem. SD 181, Hinsdale, IL

Wednesday Events

11:00 am - 12:00 pm ----- Breakout Sessions

Risk Management (AS) Committee Cyber Risk Management
Salon V

This presentation will educate school business officials and risk managers on the threats that endanger their core electronic assets. The most effective risk management response to these threats is to utilize a cross-disciplinary team to help identify and effectively manage the massive risk posed by uncontrolled computer networks. Insurance, information security and legal aspects of the cyber issues will be discussed. Schools will be shown how a full-spectrum approach can help identify and effectively manage their electronic and Internet exposures.

*Speaker(s): Michael J. McHugh, Sr. Vice President, A. J. Gallagher, Itasca, IL
Peter Schindel, Dir./Cyber Risk Services, Arthur J. Gallagher & Co., Chicago, IL*

Moderator: Michael J. McHugh, Sr. Vice President, A. J. Gallagher, Itasca, IL

Strategic Planning and Instructional Support and Evaluation Programs (IM) Committee Wireless LANS and WANS
Broadway A

How do you deploy secure wireless networks inside buildings and between buildings? This session describes methods to effectively create these networks in your school.

*Speaker(s): Craig M. Williams, Chief Information Officer, Naperville CUSD 203, Naperville, IL
Rehman R. Ali, District Technology Director, Burbank SD 111, Burbank, IL*

Moderator: Craig M. Williams, Chief Information Officer, Naperville CUSD 203, Naperville, IL

12:00 pm - 4:00 pm ----- Exhibits Open

Mega Center, Exhibit Hall

12:00 pm - 1:30 pm ----- Lunch

Mega Center, Exhibit Hall

2:00 pm - 3:00 pm ----- Breakout Sessions

Accounting, Auditing & Financial Reporting (FRM) Committee Internal Controls for Schools: More Benefit, Less Cost
Coral

This session will focus on how to make the most of your resources allocated to the business office. We will explore the necessary internal controls, focusing on areas of importance to public school districts, and examine alternative solutions for the difficult-to-control areas such as student activity funds, food service programs, and bookstores. We will also discuss a vision of the business office of the future.

Speaker(s): Timothy Cole, Managing Partner, William F. Gurrie & Co., Ltd., Oak Brook, IL

Moderator: Michael J. Locigno, Business Manager, Berkeley SD 87, Berkeley, IL

2:00 pm - 3:00 pm ----- Breakout Sessions

Budgeting & Financial Planning (FRM) Committee Budgeting for Energy Costs
Jade

You see higher prices at the gas station and you constantly read about record high oil prices, but how will this impact your energy budget? In many schools, energy costs are the highest expense next to salaries. Fortunately energy costs yield a tremendous opportunity to reduce expenditures without negatively impacting the learning environment. In “Budgeting for Energy Costs” we will discuss the current volatile energy market, opportunities to reduce energy and arm you with information to make accurate decisions regarding your energy budget.

*Speaker(s): David George, Energy Manager, Siemens Building Technologies, Mt. Prospect, IL
 Steven J. Kowalski, Sr. Account Executive, Siemens Building Technologies, Mt. Prospect, IL
 Curtis J. Saindon, Asst. Supt./Business Services, Kanakahee SD 111, Kanakahee, IL*

Moderator: Ken Detina, Account Executive, Siemens Building Technologies, Mt. Prospect, IL

Legal Issues (EE) Committee The 2005 Education Workplace: Labor Trends and FLSA Issues
Salon V

A practical and interactive discussion on addressing the difficult workplace issues of the day including subcontracting of bargaining unit work; bargaining insurance and retirement benefits; and avoiding Fair Labor Standards Act (FLSA) violations. The presentation will include 1) a focus on recent developments with respect to schools attempting to subcontract services traditionally performed by bargaining unit members, 2) the impact of changes in the provision of health care insurance and retirement benefits on the bargaining process and 3) a discussion on determining who is an exempt employee under the new FLSA and the nagging problem of what to do with the employee who performs more than one position with a district.

*Speaker(s): Joseph F. Bettuzzi, Dir./Buildings & Grounds, Niles Elem. SD 71, Niles, IL
 Kenneth M. Florey, Partner, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL
 Joe Perkoski, Attorney, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL*

Moderator: Kristopher P. Monn, Business Manager, Lemont-Bromberek CSD 113A, Lemont, IL

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee A Comprehensive Guide to the 403(b) New Regulations and Guidelines
Salon VI

What are your district’s obligations in complying with IRS 403(b) Regulations?

*Speaker(s): Tamara M. Vaughn, Sr. V. P./Employee Benefits & QPA, QKA, Citizens Bank & Trust, Maryville, MO
 Kelli Smith, Agent, Internal Revenue Service, Chicago, IL*

Moderator: Sheila Peckler, Business Manager, Gurnee SD 56, Gurnee, IL

Principles of School Finance (FRM) Committee Communicating Financial Information With Integrity to Your Board
Broadway B

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

Moderator: Susan L. Huselbee, Dir./Fiscal Services, Niles Twp. HSD 219, Skokie, IL

Wednesday Events

2:00 pm - 3:00 pm ----- Breakout Sessions

Professional Development (HRM) Committee Structuring Work Groups - Using More than Just Intuition
Turquoise A/B

There are some simple and effective concepts to help structure a work group or office staff. These can be used when hiring people to fit particular jobs or moving people around so that you can best use their skills. Most good managers do this using intuition and experience. We will look at some theoretical and practical aspects that can be added to your tool kit.

*Speaker(s): Raymond L. Costa, Jr., Dir./Business, Beach Park CCSD 3, Beach Park, IL
Donald Robinson, Asst. Supt./Business, Zion Public SD 6, Zion, IL*

Moderator: Mary J. Chlystek, Dir./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL

Public Policy & Intergovernmental Relations (EE) Committee Administrative Certification
Broadway A

The certification renewal process for administrators has been subjected to significant legislative changes. The presenter will review all changes and the professional development requirements that must be developed by each administrator.

Speaker(s): Calvin C. Jackson, Legislative Liaison/Prof. Dev. Consultant, Illinois ASBO, Fairbury, IL

Moderator: Calvin C. Jackson, Legislative Liaison/Prof. Dev. Consultant, Illinois ASBO, Fairbury, IL

Public Policy & Intergovernmental Relations (EE) Committee HB & SB 750
Salon II

Join Ralph Martire from the Center for Tax & Budget Accountability and your peers for a lively discussion on HB & SB 750.

Speaker(s): Ralph Martire, Executive Director, Center for Tax & Budget Accountability, Chicago, IL

Moderator: Raymond F. Coyne, Sr. Vice President, Hutchinson, Shockley, Erley & Co., Chicago, IL

Risk Management (AS) Committee Annual Tort Update
Sapphire

Keep abreast with the latest changes in Tort Legislation. Learn items that can be charged to your Tort Fund, freeing up valuable resources from your Education Fund and O & M Fund. A Risk Management Plan that will help you survive a Tort audit will also be presented.

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

Moderator: Richard A. Lesniak, Asst. Supt./Business Services, Orland SD 135, Orland Park, IL

2:00 pm - 3:00 pm ----- Breakout Sessions

Risk Management (AS) Committee Consumer-Directed Healthcare - Is It a Solution for Illinois Schools?
Broadway C

This session will focus on the popularity of new consumer-directed health care plans among public school districts across the country. Discussion topics will include: 1) introduction & overview, 2) methodology, 3) case examples, 4) determine if consumer-directed healthcare is right for your district.

*Speaker(s): Richard J. Allen, Jr., President, America's VEBA Solutio, Minneapolis, MN
 Darcy L. Hitesman, JD., P.C. Benefits Compliance & General Counsel, America's VEBA Solution, Minneapolis, MN
 Catherine M. Loney, Sr. Employee Benefit Consultant, GCG Financial, Inc., Bannockburn, IL*

Moderator: Wayne B. Berzon, Vice Pres./Public Sector, GCG Financial, Inc., Bannockburn, IL

Technology for School Finance Operations (FRM) Committee Selecting Administrative Software
Ruby

What to look for in Financial/Student Information Systems. How to select software and questions to ask.

*Speaker(s): Christine E. Haeggquist, Marketing Specialist, Kirtley Technology Corporation, Darien, IL
 Tamer M. Milad, Marketing Director, Data Control & Research, Ltd., Darien, IL
 Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL
 Hal W. Shroats, Partner, Customized Relational Technology, Inc., Tinley Park, IL*

Moderator: Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL

Technology for School Finance Operations (FRM) Committee Digitizing Student Records for Efficiency and Safety Utilizing Current Assets
Preservation Hall A

One of the most common challenges that school systems face is organizing and accessing student records. A simple request for information, whether for current or former students, can take weeks or months to fulfill, driving the need for a more efficient and cost-effective way to find and retrieve the records. Student records very often include personal information such as medical data, teacher notes, grades and attendance records. As a result, they're revised often and requested frequently. The primary focus of this session will be to discuss how Document Management technologies can streamline business processes, using the print and scan hardware that you already have. Records and information must remain confidential, but must be quickly retrievable so that documents can be updated, shared and distributed when needed.

*Speaker(s): Kevin Ferrara, District Sales Manager, Oce North America, Inc., Chicago, IL
 Daron Sheldon, Technical Specialists, Oce North America, Inc., Chicago, IL*

Moderator: Mark S. Michelini, Asst. Supt./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL

3:15 pm - 4:45 pm ----- Breakout Sessions

Accounting, Auditing & Financial Reporting (FRM) Committee The Evolving AFR - Looking Towards Better Comparability
Broadway B

This session will focus on updating business personnel on changes to the Annual Financial Report, Financial Profile and IPA Manual, in addition to highlighting upcoming changes that will be made to the current accounting structure as a result of federal mandates.

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

Moderator: Hillarie J. Siena, Dir./Business Affairs, Northfield Twp. HSD 225, Glenview, IL

Wednesday Events

3:15 pm - 4:45 pm ----- Breakout Sessions

Budgeting & Financial Planning (FRM) Committee Budgeting and Expenditure Control - Solutions to the Big Issues
Salon V

In this session, panelists will discuss techniques for the accurate budgeting and control of salaries and benefits, building costs, and transportation. They will illustrate methods for position control for K-12 staff, staffing for inclusion and English language services, and options for control of non-personnel expenditures. Outsourcing of building and transportation services will also be covered, including the cost, contractual and political issues that are involved in a decision on whether to outsource.

Speaker(s): Gary L. Ofisher, Asst. Supt./Business, North Shore SD 112, Highland Park, IL
Robert A. Lanzerotti, Dir./Buildings & Grounds, North Shore SD 112, Highland Park, IL
Lauren McIntyre, Asst. Supt. for Staff, North Shore SD 112, Highland Park, IL
James B. Fritts, Visiting Asst. Professor, Loyola University Chicago, Chicago, IL

Moderator: James B. Fritts, Visiting Asst. Professor, Loyola University Chicago, Chicago, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Are Variable Rate Bonds Right for My School District?
Jade

Most school districts issue traditional fixed rate bonds because that's the way it has always been done. However, the tax-exempt variable rate bond market has grown into multi-billion dollar industry since the early 1980's because of its cost-effectiveness and flexibility. Are you missing a financing opportunity because you are steeped in tradition? Our panel of financial, legal and rating agency experts will discuss and compare tax-exempt fixed and variable interest rate trends, how to levy for and administer a variable rate bond issue, how variable rate bonds can help you stabilize your tax levy year in and year out and how variable rate debt can impact your school district's credit profile. Understand why and how many issuers use the variable rate bond market to better serve their constituents and save taxpayer dollars.

Speaker(s): Ogden Kniffin, Jr., Vice President, Legg Mason Wood Walker, Inc., Chicago, IL
Todd S. Krzyżkowski, Vice President, J. P. Morgan Securities, Inc., Chicago, IL

Moderator: Luke V. Glowiak, Asst. Supt./Business, Sycamore CUSD 427, Sycamore, IL

Legal Issues (EE) Committee What Does Your School Attorney Think of You?
Salon VI

Learn what information your school attorney needs to know in order to properly advise the school business official. A well informed attorney is able to anticipate potential problems before they become a crisis in your career. Your school attorney would prefer to make you look good by educating you on critical legal issue in advance, rather than bailing you out of a legal morass after the fact.

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

Moderator: Joanna Medwick, Principal/Dir. of Buildings & Grounds, Franzen Intermediate School 10, Catalpa, IL

Legal Issues (EE) Committee IDEA Reauthorization 2004 and NCLB
Broadway A

This session will cover the major changes in the IDEA (Individuals with Disabilities Education Act) Reauthorization and the interaction of IDEA with NCLB (No Child Left Behind). Specific issues addressed include: funding, assessment, student discipline and placement/choice.

Speaker(s): David A. Harley, General Counsel, SEDOL, Scariano, Himes, & Petrarca, CHTD, Gages Lake, IL

Moderator: Roxanne G. Kovacevich, Executive Director, Lockport Area Special Ed. Co-op, Lockport, IL

3:15 pm - 4:45 pm ----- Breakout Sessions

Maintenance & Operations (FM) Committee Infrared Thermography and the Detection of Moisture in Roofing Systems
Sapphire

This presentation will illustrate the advantages of utilizing IR scans to locate moisture in roofing systems to assist building managers in budgeting for roof maintenance, repairs, replacements, and the development of effective roof asset management programs that assist the facilities manager in avoiding emergency expenditures for roof replacements. The program will include the following: 1) IR basics - How does it work? 2) History of IR and detection of moisture in roof insulation 3) Other IR applications 4) What does it cost? 5) Limitations and 6) live demonstrations.

Speaker(s): David T. Velcheck, Dir./Marketing - Milwaukee, INSPEC, Inc., Milwaukee, WI

Moderator: Patrick K. Hurley, Dir./Buildings & Grounds, Hinsdale Twp. HSD 86, Hinsdale, IL

Planning & Construction (FM) Committee Lessons Learned in Stretching Your Capital Improvement Dollars
Turquoise A/B

Valley View School District 365-U in Will County Illinois has recently completed a massive \$143.2 M building program that created new schools at the K-5, 6-8 and 9-12 grade levels through the construction of only one new building. The proof of successful results lies in the fact that, prior to completion, the School District commenced a new K-8 school without having to pursue a second referendum question. The case study will present several strategies used to forge a path to success: 1) a thoughtful approach to managing growth; 2) strategic planning in their referendum approach and ballot question; 3) a financing approach used to “stretch” referendum dollars; 4) a unique design and construction delivery method; 5) implementation of an owner-controlled insurance program; 6) utilization of available energy grant programs; 7) operational costs reduction through sustainable design; and 8) the outsourcing of technology support services.

Speaker(s): John M. Carmody, Vice President, A. J. Gallagher, Itasca, IL
Gregg L. Worrell, Assistant Superintendent, Valley View CSD 365-U, Romeoville, IL
Michael Lopez, Sr. Project Manager, Wight & Company, Inc., Darien, IL
Brad A. Paulsen, Dir./K-12 Educational Practice, Wight & Company, Inc., Darien, IL
Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL

Moderator: Noel Rolle, Dir./Facility Operations, Geneva CUSD 304, Geneva, IL

Professional Development (HRM) Committee Alternative Certification: The Chief School Business Officials’ Pathway to Superintendency
Ruby

The Alternative Certification Program at Western Illinois University offers CSBOs, who have not taught in the K-12 classrooms, an opportunity to obtain a Type-75 Superintendent’s Certificate.

Speaker(s): Robert F. Hall, Professor and Chair, Western Illinois University, Educational Leadership, Macomb, IL

Moderator: David W. Cratty, Asst. Supt./Finance, Crystal Lake CSD 47, Crystal Lake, IL

Professional Development (HRM) Committee Ethics Law Update
Broadway C

Learn and ask questions about the Ethics Bill. Has your district implemented procedures? What are the potential changes to the bill? What are the most recent updates?

Speaker(s): Vern Kowal, Partner, Sedgwick, Detert, Moran & Arnold LLP, Chicago, IL
Jay Plese, Superintendent, Wilmington SD 209U, Wilmington, IL

Moderator: Wendy J. Flaherty, Vice President, First Trust Portfolios, Lisle, IL

Wednesday Events

3:15 pm - 4:45 pm ----- Breakout Sessions

Technology for School Finance Operations (FRM) Committee LAB: Advanced Microsoft Word Office 2000
Skybox 1 & 2 (overlooking the Exhibit Hall)

This session is designed for the person who uses Microsoft Word but would like to make their documents more readable as well as learn some tips to make Word easier to use. Attendees will learn how to insert and edit tables, insert photos and pictures, manipulate text boxes and other techniques that will take the mystery out of how to make a professional looking document.

Speaker(s): Joseph V. Pandolfo, Dir./Finance & Operations, Westchester SD 92.5, Westchester, IL

Moderator: Jeffrey K. Schroeder, Educational Services Manager, Foundation For Educational Services, Inc., Lincoln, NE

3:15 pm - 4:45 pm ----- Gold Mine Sessions

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Gold Mine: Investing 101
Salons I, III, IV

How can schools maximize investment revenue? Which tools can help in the investment process? Other topics to be covered include the public funds investment act, the importance of the district investment policy, investment procedures, cash flow analysis modeling, and an explanation of applicable investment instruments. These are just some of the questions and topics that will be covered in this session.

Speaker(s): Laura A. Pauli, Associate Vice President, PMA Financial Network, Inc., Warrenville, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Gold Mine: Is Your Collateral Perfected?
Salons I, III, IV

Is your money safe??? Safety of your investments is the first and most important issue for the School investor. What steps do you need to take to perfect collateral? What should you look for from your depositor? What are the common pitfalls that public entities run into regarding their collateral agreements? We will address these questions and more during this interactive goldmine session.

Speaker(s): Fenil J. Patel, Associate Vice President, PMA Financial Network, Inc., Warrenville, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Gold Mine: Referendum Strategies
Salons I, III, IV

Selective stealth campaign or a selective barrage? Referendums can be successful if good foundations are established as to the need or if the local environment shouts out the obviousness of the need or if the message is effectively communicated enough times to be heard and believed in the weeks immediately before the election. Understanding your situation and your remaining time determine the effective strategy.

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

Communications (IM) Committee Gold Mine: Five Telecommunications Trends a School Business Administrator Needs To Know
Salons I, III, IV

A telecommunications professional talks about the five leading trends in school telecommunications and technology today including Voice Over IP, E-rate, fiber optics, wireless services and outsourcing for cost control.

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

3:15 pm - 4:45 pm ----- Gold Mine Sessions

Maintenance & Operations (FM) Committee Gold Mine: Indoor Air Quality and Mold
Salons I, III, IV

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

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee Gold Mine: Voluntary Long-Term Care
Salons I, III, IV

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

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee Gold Mine: Why You Should Offer Financial
Education Seminars for Your Educators
Salons I, III, IV

Speaker(s): Wayne B. Berzon, Vice President, Public Sector, GCG Financial, Inc., Bannockburn, IL
Eric B. Rosenbloom, Financial Advisor, GCG Financial, Inc., Bannockburn, IL

Principles of School Finance (FRM) Committee Gold Mine: Managing Your Debt: Borrowing For Construction
Salons I, III, IV

Short-term financing options will also be addressed.

Speaker(s): James N. Rachlin, Sr. Vice President, Griffin, Kubik, Stephens & Thompson, Inc., Chicago, IL
Robert J. Bergland, Sr. Vice President, Hutchinson, Shockey, Erley & Co., Chicago, IL

Public Policy & Intergovernmental Relations (EE) Committee Gold Mine: Legislative Frameworks Update
Salons I, III, IV

Speaker(s): Susan P. Bertrand, Senior Portfolio Advisor, PMA Financial Network, Inc., Warrenville, IL
Todd R. Drafall, Dir./Finance, Aurora West SD 129, Aurora, IL

Risk Management (AS) Committee Gold Mine: Environmental Update
Salons I, III, IV

Hear the latest and greatest news slated to affect Illinois schools in the coming year. Have your questions regarding asbestos, lead, and emission issues answered, and learn what steps your district should take to be compliant with state and federal regulations.

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

Risk Management (AS) Committee Gold Mine: GASB 34 Update
Salons I, III, IV

A must for new Business Managers. This session will discuss the implementation and continuation of GASB 34. Learn from experience the best way to manage your assets under GASB 34.

Speaker(s): Jim Karagianis, District Sales Representative, Industrial Appraisal Company, Park Ridge, IL

Wednesday Events

3:15 pm - 4:45 pm ----- Gold Mine Sessions

Risk Management (AS) Committee Gold Mine: Organizing Your Business Office Files
Salons I, III, IV

Avoid embarrassing situations due to lost or mismanaged records. A simple, practical and effective way of organizing your business office records will be presented.

Speaker(s): Richard A. Lesniak, Asst. Supt./Business Services, Orland SD 135, Orland Park, IL

3:15 pm - 4:15 pm ----- Super Sectional

Public Policy & Intergovernmental Relations (EE) Committee Update from the State Superintendent
Salon II

State Superintendent, Dr. Randy Dunn, will provide an update on the State Board of Education. He will also be available to answer your questions.

Speaker(s): Randy J. Dunn, Interim State Superintendent, IL State Board of Education, Springfield, IL

Moderator: Edward M. O'Malley, Orland Park, IL

5:00 pm - 6:00 pm ----- Hospitality

New Orleans

8:00 pm - 11:30 pm ----- Mixer: "Casino Night"

St. Charles Ballroom

After dinner, join us for a fun-filled evening of hospitality, games, and music. Our mixer will be tailored around a "casino night" theme, but there is much more! Try your hand at the various gaming tables, such as black jack, dice and roulette and other various competitive games. Or maybe you'd like to have your golf swing analyzed by a professional and get tips on how to improve your swing. If games aren't your bag, enjoy the music, dancing, and antics of our DJ. If none of these entice you, then just join us for hospitality and sit back and watch everyone else - that in itself is entertaining! By the way, don't forget to sign up as a dealer. Dress is casual.

Thursday Meeting-at-a-Glance

Meeting-at-a-Glance Schedule: Thursday, May 5, 2005

6:00 am - 7:00 am	5KM Run & Walk - <i>Golf Pro Shop (5:45 am)</i>						
7:00 am - 5:00 pm	Registration Desk Open - <i>Mega Center</i>						
7:30 am - 9:00 am	Professional Development Committees' Planning Meeting/Breakfast - <i>Salons III, IV</i>						
9:00 am - 9:50 am	Annual Service Associate Business Meeting - <i>Salon II</i>						
9:00 am - 11:15 am	Facility Breakfast Forum - <i>New Orleans</i>						
9:00 am - 10:00 am	Breakout Sessions						
	Accounting, Auditing & Fin. Reporting Board Reports: Does Your Board Understand You? <i>Coral</i>	Accounting, Auditing & Fin. Reporting The GASB & AICPA Never Quit: More New Pronouncements that Affect 2005 Audits (GASB 43, 45 and SAS 99 revisited) <i>Broadway C</i>	Cash Mgmt, Investments & Debt Mgmt Banking Technology <i>Arnold Palmer</i>	Legal Issues Board Policies, Procedures and Best Practices <i>Salon VI</i>	Legal Issues Theft and Fraud - Investigation, Prosecution, and Prevention <i>Broadway B</i>	Personnel, Human Relations, Benefits Admin., Labor Rel. & Employment Agreements Health, Wealth, & Wellness: Ways to Save Through Wellness Programs <i>Salon V</i>	
10:00 am - 3:00 pm	Exhibits Open (Free to all Support Personnel - Pre-registration required) <i>Mega Center, Exhibit Hall</i>						
10:15 am - 11:15 am	Breakout Sessions						
	Budgeting & Fin. Planning Indicators of Fin. Health <i>Broadway A</i>	Cash Mgmt, Investments & Debt Mgmt Cash Flow Analysis: Never More Important <i>Ben Hogan</i>	Cash Mgmt, Investments & Debt Mgmt Short-Term Borrowing - The What, Why, When, and How <i>Ben Hogan</i>	Legal Issues Fair Labor Standards Act (FLSA) & Overtime - The New Rules <i>Salon III</i>	Maintenance & Operations Privatizing? Should I? How Do I Begin? <i>Sapphire</i>	Management Info. Systems LAB: Advanced Excel <i>Skybox 1 & 2</i>	Personnel, Human Relations, Benefits Admin., Labor Rel. & Employment Agreements Employee Assistance Programs (EAP) ... Shows That You Care <i>Ruby</i>
11:30 am - 12:00 pm	Annual Business Meeting of the Association - <i>Salon II</i>						
12:00 pm - 1:30 pm	Lunch served in Exhibit Hall - <i>Mega Center</i>						
2:00 pm - 3:00 pm	Breakout Sessions						
	Accounting, Auditing & Fin. Reporting CAFR Statistical Section - Changes for FY05-06 <i>Broadway C</i>	Accounting, Auditing & Fin. Reporting Fin. Reporting in a Referendum Environment <i>Broadway A</i>	Budgeting & Fin. Planning Strategies For Successful Tax Rate Referenda <i>Ruby</i>	Cash Mgmt, Investments & Debt Mgmt Operating Student Activity Accounts <i>Turquoise A/B</i>	Legal Issues Legal Updates for SBO <i>Salon II</i>	Maintenance & Operations Green Schools <i>Salon VI</i>	
3:15 pm - 4:45 pm	Breakout Sessions						
	Budgeting & Fin. Planning Phasing-In Tax Rate Referenda <i>Ruby</i>	Cash Mgmt, Investments & Debt Mgmt Health Insurance Plans: How Restructuring Can Reduce Costs <i>Turquoise A/B</i>			Communications Voice Over IP Telephone Systems For Schools <i>Broadway A</i>		
5:00 pm - 6:00 pm	Hospitality - <i>New Orleans</i>						
6:00 pm - 9:30 pm	Recognition Banquet & Entertainment - <i>St. Charles Ballroom (Salons)</i>						
9:30 pm - 12:00 am	Hospitality, D.J. & Caricature Artists - <i>St. Charles Ballroom (Salons)</i>						

Meeting-at-a-Glance Schedule: Thursday, May 5, 2005								
5KM Run & Walk - <i>Golf Pro Shop (5:45 am)</i>								
Registration Desk Open - <i>Mega Center</i>								
Professional Development Committees' Planning Meeting/Breakfast - <i>Salons III, IV</i>								
Annual Service Associate Business Meeting - <i>Salon II</i>								
Facility Breakfast Forum - <i>New Orleans</i>								
Personnel, Human Relations, Benefits Admin., Labor Rel. & Employment Agreements GASB 43 & 45 OPEB - Accounting for Post-Employment Benefits Other Than Pensions - Are You Prepared? <i>Sapphire</i>		Principles of School Finance School Finance Revenues for the Novice <i>Preservation Hall A (ends at 11:15 am)</i>		Professional Development Identity Theft <i>Ruby</i>	Professional Development Managing the Media <i>Broadway A</i>	Professional Development Setting Up a Credit Card System <i>Arnold Palmer</i>	Purchasing LAB: Review of Purchasing Handbook for Illinois Schools <i>Skybox 1 & 2</i>	Technology for School Finance Operations Student Debit Cards <i>Turquoise A/B</i>
Exhibits Open (Free to all Support Personnel - Pre-registration required) <i>Mega Center, Exhibit Hall</i>								
Professional Development Pre-Paid Legal Services <i>Salon V</i>	Professional Development Workers' Compensation Pool Claims & Risk Control Strategies <i>Salon VI</i>	Public Policy & Intergovernmental Relations ISBE Funding Update <i>Salon IV</i>	Risk Mgmt. Employment Practice Liability - What You Need to Know <i>Broadway B</i>	Risk Mgmt. HIPAA - Back to Basics <i>Broadway C</i>	Special Education: Admin. & Fin. What's New In Special Education Funding <i>Turquoise A/B</i>	Supply & Fixed Asset Mgmt. Tales Last Summer - GASB 34 Capital Asset Reporting in Practice <i>Coral</i>	Performativity and the New Public Mgmt.: Issues of Entrepreneurial Public/Private Partnership in the Field of Site-Level SBM Preparation <i>Jade</i>	
Annual Business Meeting of the Association - <i>Salon II</i>								
Lunch served in Exhibit Hall - <i>Mega Center</i>								
Mgmt. Info. Systems LAB: Adv. PowerPoint <i>Skybox 1 & 2</i>	Plan. & Construction Adding Value with Integrated Interiors <i>Jade</i>	Plan. & Construction Fundamentals of Good Roof Design & Main. <i>Sapphire</i>	Principles of School Finance School Fin. Exp. & Alternative Borrowing <i>Salon IV</i>	Professional Development How To Effectively Partner With Your PTO/PTA Booster & Foundations <i>Salon V</i>	Public Policy & Intergovernmental Rel. Ethics Act <i>Broadway B</i>	Risk Mgmt. School Security <i>Salon III</i>	How School Finance Works in the UK <i>Coral</i>	
Legal Issues Is a Written 403(b) Plan Document on the Horizon for School Districts? <i>Broadway B</i>		Maintenance & Operations Playground Safety <i>Sapphire</i>		Planning & Construction Ten Year Life Safety Surveys - 2005 Deadline <i>Jade</i>		Professional Development School District Online Web Stores/Increase Revenues <i>Broadway C</i>		
Hospitality - <i>New Orleans</i>								
Recognition Banquet & Entertainment - <i>St. Charles Ballroom (Salons)</i>								
Hospitality, D.J. & Caricature Artists - <i>St. Charles Ballroom (Salons)</i>								

Thursday Events

6:00 am - 7:00 am ----- **5KM Run & Walk**
Meet outside Golf Pro Shop at 5:45 am

7:00 am - 5:00 pm ----- **Registration Desk Open**
Exhibit Hall

7:30 am - 9:00 am ----- **Professional Development Committees' Planning Meeting & Breakfast**
Salons III, IV

9:00 am - 9:50 am ----- **Annual Service Associate Business Meeting**
Salon II

As a Service Associate member, this meeting is a “must” for you. At this meeting, the Service Associate Advisory Committee (SAAC), along with the Association’s Officers and Executive Director, meet to discuss various issues affecting Service Associate members. In addition, you’ll be asked to cast a vote for the candidates nominated for vacant positions on the SAAC - your vote counts. The SAAC nominees are: Lee Pietrowski, John B. Losch, Christopher W. Lutz and John Doherty. This is also an excellent opportunity for you to bring to the floor any issues you’d like discussed. Be sure to attend!

9:00 am - 11:15 am ----- **Facility Breakfast Forum**
New Orleans

Open forum discussion with Facilities and Buildings and Grounds Supervisors and Directors. This session provides you with a chance to meet your neighbors and 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.

9:00 am - 10:00 am ----- **Breakout Sessions**
Accounting, Auditing & Financial Reporting (FRM) Committee The GASB & AICPA Never Quit: More New Pronouncements that Affect 2005 Audits (GASB 43, 45 and SAS 99 revisited)
Broadway C

There are more new pronouncements from the accounting and auditing professionals. New footnote disclosures and potential liabilities reported in the financial statements are on the way. Also, SAS 99 (statement on auditing standards) continues to challenge auditors and School Business Officials to understand and identify potential fraud situations. Learn what these new pronouncements mean to school business officials and how to communicate what these pronouncements mean to the Board of Education.

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

Moderator: Stacey L. Mallek, Exec. Dir./Business Services, East Maine SD 63, Des Plaines, IL

9:00 am - 10:00 am ----- Breakout Sessions

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

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
 Hillarie J. Siena, Dir./Business Affairs, Northfield Twp. HSD 225, Glenview, IL*

Moderator: Hillarie J. Siena, Dir./Business Affairs, Northfield Twp. HSD 225, Glenview, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Cash Flow Analysis: Never More Important
Ben Hogan

With short-term interest rates at all time lows, a low CPI affecting the tax cap, and delayed state funding, it has never been more important to have a complete understanding of your district's cash flow. The process of developing a cash flow analysis will be discussed. Reasons to do a cash flow will be initially reviewed followed by a discussion on how to develop micro and macro assumptions by asking key questions. 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 shortfalls will be covered.

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

Moderator: Fenil J. Patel, Associate Vice President, PMA Financial Network, Inc., Warrenville, IL

Legal Issues (EE) Committee Theft and Fraud - Investigation, Prosecution, and Prevention
Broadway B

Protect your district's assets from an employee's dishonesty with methods to discern when there is a problem, what to do about it, and how not to have it happen again. Topics will include investigation of petty theft, embezzlement, and other improper acts, when to prosecute, how to get restitution, insurance coverage, and how to avoid such acts in the future.

Speaker(s): Joe Miller, Attorney, Ottosen Trevarthen Britz Kelly & Cooper, Ltd., Wheaton, IL

Moderator: Patricia A. Masterton, Assistant Superintendent, Addison Elem. SD 4, Addison, IL

Legal Issues (EE) Committee Board Policies, Procedures and Best Practices
Salon VI

Come and hear our two experienced speakers discuss the importance of developing effective and organized board policy, the role and use of administrative procedures in conjunction with board policy, and best practices related to policy and procedure development. A discussion of available resources, including the IASB PRESS service and other sources for developing effective board policy will also be addressed.

*Speaker(s): Cathy A. Talbert, Assoc. Exec. Dir./Policy Services, IL Assoc. of School Boards (IASB), Lombard, IL
 Cynthia L. Heidorn, Superintendent, Gower SD 62, Willowbrook, IL*

Moderator: Curtis J. Saindon, Asst. Supt./Business Services, Kanakaakee SD 111, Kanakaakee, IL

Thursday Events

9:00 am - 10:00 am ----- Breakout Sessions

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee Health, Wealth, & Wellness: Ways to Save Through Wellness Programs
Salon V

What school districts can do to impact sharply rising costs and the unpredictability of health insurance.

*Speaker(s): Debra M. Parenti, Asst. Supt./Business, Lake Park CHSD 108, Roselle, IL
David Carrell, Area Sr. V.P./Client Development, Gallagher Benefit Services, Inc., Itasca, IL*

Moderator: Debra M. Parenti, Asst. Supt./Business, Lake Park CHSD 108, Roselle, IL

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee GASB 43 & 45 OPEB - Accounting for Post-Employment Benefits Other Than Pensions - Are you Prepared?
Sapphire

GASB will soon require governments and public school districts that offer post-retirement healthcare and other post-employment benefits to accrue the cost of these benefits as they are earned by employees. This session will explore both the details of the new requirements in Statements 43 and 45 and their potential impact on public school districts. In addition, solution strategies will be discussed to help build an understanding of how to mitigate this potentially significant liability. Discussion topics include: 1) What GASB OPEB is, 2) What your GASB OPEB responsibilities are, 3) How this new unfunded liability will affect your financial future, 4) When GASB OPEB liability needs to be recognized, and 5) How to develop strategies to reduce your unfunded liability.

*Speaker(s): Richard J. Allen, Jr., President, America's VEBA Solution, Minneapolis, MN
Darcy L. Hitesman, JD., P.C. Benefits Compliance & General Counsel, America's VEBA Solution, Minneapolis, MN
Catherine M. Loney, Sr. Employee Benefit Consultant, GCG Financial, Inc., Bannockburn, IL*

Moderator: Wayne B. Berzon, Vice Pres./Public Sector, GCG Financial, Inc., Bannockburn, IL

Principles of School Finance (FRM) Committee School Finance Revenues for the Novice
Preservation Hall A
(ends at 11:15 am)

Property Taxes and the Tax Levy; and General State Aid and Grants will be addressed in this session.

*Speaker(s): Harold Huang, Asst. Supt./Financial Operations, Lincoln Way CHSD 210, New Lenox, IL
Cheryl M. Crates, Chief Financial Officer, Comm. Unit Sch. Dist. 300, Carpentersville, IL*

Moderator: Paul A. Seymour, Business Manager, Galena USD 120, Galena, IL

9:00 am - 10:00 am ----- Breakout Sessions

Professional Development (HRM) Committee Identity Theft
Ruby

Someone has stolen your credit card. Your credit card company can help you with that, right? Well, according to the Federal Trade Commission (FTC), almost 60% of identify theft issues don't pertain to your existing credit card accounts. Because we are susceptible through so many avenues in our daily life, we are all at risk. While identity theft cannot be prevented, learn how the risks of becoming a victim and the economic loss can be minimized.

*Speaker(s): Donna J. Palmieri, Group Benefits Consultant, EXCELVENTURE, LLC, Gurnee, IL
 Louis A. Archbold, Special Investigator, Lake County State's Attorney's Office, Waukegan, IL
 Scott F. Smith, President/CEO, NXG Strategies, Inc., Brentwood, TN*

Moderator: Mary J. Chlystek, Dir./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL

Professional Development (HRM) Committee Setting Up a Credit Card System
Arnold Palmer

Learn how your district considered the option of allowing parents to pay for fees online from your district website and/or with their personal credit or debit card at school? As a result of this session, you will understand the benefits for the district, the 10 key questions to ask each vendor interviewed, how credit cards work, the four models of credit card service providers and how to create a business plan.

Speaker(s): Sherrie L. Erdenberg, Sales Representative, RevTrak, St. Charles, IL

Moderator: Luann T. Mathis, NIU Graduate Student, Barrington, IL

Professional Development (HRM) Committee Managing the Media
Broadway A

How to proactively engage the media for all your communication needs, referenda, everyday activities, crisis situations, and legislative action.

Speaker(s): Kit Dunn, Referendum Specialist, Turner Construction Company, Arlington Heights, IL

Moderator: Wendy J. Flaherty, Vice President, First Trust Portfolios, Lisle, IL

Purchasing (MSM) Committee LAB: Review of Purchasing Handbook for Illinois Schools
Skybox 1 & 2 (overlooking Exhibit Hall)

Illinois ASBO's Purchasing Committee has developed a comprehensive Purchasing website for Illinois Schools. This website includes information on virtually every aspect of school district purchasing. This session will take you step-by-step through the world of purchasing with in-depth presentations by experienced purchasing administrators.

*Speaker(s): Barbara I. Stephani, Business Manager, Argo CHSD 217, Summit, IL
 Lorie M. Pilster, Coord./Business Services, Downers Grove SD 58, Downers Grove, IL*

Moderator: Steven M. East, Dir./Purchasing & Facilities, Township HSD 211, Palatine, IL

Thursday Events

9:00 am - 10:00 am ----- Breakout Sessions

Technology for School Finance Operations (FRM) Committee Student Debit Cards
Turquoise A/B

Streamline student services financial reporting with the use of student debit cards. Applications include: lunch program, library systems, and building access.

*Speaker(s): Mark S. Michelini, Asst. Supt./Business, Stevenson High School 125, Lincolnshire, IL
Thomas R. Long, Asst. Supt./Business, Burbank SD 111, Burbank, IL*

Moderator: Kevin Ferrara, District Sales Manager, Oce North America, Inc., Chicago, IL

10:00 am - 3:00 pm ----- Exhibits Open

Mega Center, Exhibit Hall

10:15 am - 11:15 am ----- Breakout Sessions

Budgeting & Financial Planning (FRM) Committee Indicators of Financial Health
Broadway A

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 panelists 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): Steve H. Larson, Sr. Vice President, Ehlers & Associates, Inc., Naperville, IL
John Kenward, Director, Standard & Poor’s, Chicago, IL
Ted Damutz, Vice Pres./Sr. Analyst, Moody’s Investors Service, Chicago, IL*

Moderator: Christopher P. Whelton, Dir./Fiscal Services, Maine Twp. HSD 207, Park Ridge, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Short-Term Borrowing - The What, Why, When, and How

Ben Hogan

Illinois school districts continue to experience financial challenges and are increasingly faced with the need to participate in short-term borrowing to get through periods of insufficient cash flow. The presenters will review the process and documentation required to satisfy bond counsel, outline the factors a rating agency considers when rating a cash flow borrowing, and will also review current market conditions for short-term debt.

*Speaker(s): Tammie S. Beckwith Schallmo, Vice President/Public Finance, LaSalle Capital Markets, Div. of ABN AMRO, Chicago, IL
Lynda K. Given, Partner, Chapman and Cutler, LLP, Chicago, IL*

Moderator: Tammie S. Beckwith Schallmo, Vice President/Public Finance, LaSalle Capital Markets, Div. of ABN AMRO, Chicago, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Banking Technology

Arnold Palmer

Is your school district looking for ways to streamline your current financial processes and at the same time save time and money? If you answered yes, you don’t want to miss this session! Learn how your district can incorporate technology and best business practices to automate payables and encourage participation in direct deposit programs.

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

Moderator: Todd C. Sholeen, Vice President, LaSalle Bank N.A., Chicago, IL

10:15 am - 11:15 am ----- Breakout Sessions

Legal Issues (EE) Committee Fair Labor Standards Act (FLSA) & Overtime - The New Rules
Salon III

Make sure you know what the new rules mean. FLSA and Overtime regulations must be implemented to ensure your district is in compliance.

Speaker(s): Therese L. Hodges, Partner, Hodges, Loizzi, Eisenhammer, Rodick & Kohn, Arlington Heights, IL

Moderator: Raymond P. Negrete, Business Manager, Reavis Twp. HSD 220, Burbank, IL

Maintenance & Operations (FM) Committee Privatizing? Should I? How Do I Begin?
Sapphire

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

Speaker(s): Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Downers Grove, IL

Gary B. Stanley, Dir./Facilities, Aptakisic-Tripp CCSD 102, Buffalo Grove, IL

Moderator: Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Downers Grove, IL

Management Information Systems (IM) Committee LAB: Advanced Excel
Skybox 1 & 2 (Overlooking the Exhibit Hall)

Join Tom Zelek for tips, tricks, and traps associated with advanced applications in Excel. Some of the topics include merging, multiple worksheets, spreadsheets, formulas, etc.

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

Moderator: Susan Laff, Dir./Business Services, Burbank SD 111, Burbank, IL

Personnel, Human Relations, Benefits Administration, Labor Relations and Employment Agreements (HRM) Committee Employee Assistance Programs (EAP)
Shows That You Care
Ruby

This is not your Grandmothers EAP ... when most people think about Employee Assistance Programs, they think of counseling and treatment for employees with substance abuse problems. Of course, this is still true, but boy have things changed! It's not a simple cliché to say that employees are an employer's most valuable resource. Consequently, companies of all sizes are partnering with Employee Assistance Programs to accomplish strategic goals in the areas of employee recruitment, retention, and training.

Speaker(s): Michael J. Davis, Chief Operating Officer, Creative Care Management, Ltd., Winfield, IL

Marcy Traxler, Regional Manager, Creative Care Management, Ltd., Winfield, IL

Moderator: Beth R. Dever, Business Manager, Avoca SD 37, Wilmette, IL

Thursday Events

10:15 am - 11:15 am ----- Breakout Sessions

Professional Development (HRM) Committee Workers' Compensation Pool Claims and Risk Control Strategies
Salon VI

If you want to control your Workers' Compensation Insurance premiums, come and discuss trends and strategies used in the school environment that could help you manage your loss experience, keep your claims at a minimum, and have a happy and safe worker.

*Speaker(s): Rick I. Grobart, Sr. Risk Control Consultant, Account Coord., Gallagher Bassett Services, Inc., Itasca, IL
Jenny Houston, Claims Supervisor, Gallagher Bassett Services, Inc., Oak Brook Terrace, IL*

Moderator: Richard A. Ewanio, Business Administrator, Prospect Heights SD 23, Prospect Heights, IL

Professional Development (HRM) Committee Pre-Paid Legal Services
Salon V

How much does it cost to hire, train and replace employees because you had to let them go due to personal legal problems? Your employees' legal problems cost you money in terms of absenteeism, reduced productivity and increased health insurance costs. Pre-Paid Legal Services plans are designed to meet the most common legal needs encountered by your employees and their families. This allows them to focus on their job, not their problems. Offered as a voluntary employee benefit, a Pre-Paid Legal plan gives you a competitive advantage for recruiting new employees and keeping them.

*Speaker(s): Donna J. Palmieri, Group Benefits Consultant, EXCELVENTURE, LLC, Gurnee, IL
Douglas A. Roberts, V.P. of Group Marketing, Pre-Paid Legal Services, Inc., Bristol, IL
Scott F. Smith, President/CEO, NXG Strategies, Inc., Brentwood, TN*

Moderator: Mary J. Chlystek, Dir./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL

Public Policy & Intergovernmental Relations (EE) Committee ISBE Funding Update
Salon IV

Linda Mitchell, Chief Financial Officer / Financial Services brings you up-to-date on funding for the State Board of Education.

Speaker(s): Linda Mitchell, Chief Financial Officer / Financial Services, IL State Board of Education, Springfield, IL

Moderator: Wayne J. Azon, Business Manager, Genoa-Kingston CUSD 424, Genoa, IL

Risk Management (AS) Committee Employment Practice Liability - What You Need to Know
Broadway B

This session will educate school business officials and superintendents on the current issues and trends involving employment practice liability. You will learn how to properly release a bad employee, and what steps you need to take to protect your district and yourself and avoid costly litigation and time in court.

*Speaker(s): Michael J. McHugh, Sr. Vice President, A. J. Gallagher, Itasca, IL
Wayne F. Plaza, Attorney at Law, Dykema Gossett Rook's Pitts, Chicago, IL
David L. Miller, Attorney at Law, Dykema Gossett Rook's Pitts, Chicago, IL*

Moderator: Michael J. McHugh, Sr. Vice President, A. J. Gallagher, Itasca, IL

10:15 am - 11:15 am ----- Breakout Sessions

Risk Management (AS) Committee HIPAA - Back to Basics
Broadway C

Find out what has really happened since the full implementation of HIPAA. Was it worth the effort? And what can we expect going forward? You will also find out the basics about security and what you should be doing now to comply or prepare for compliance.

*Speaker(s): Ted A. Reese, President, Corporate Benefit Consultants, Inc., Des Plaines, IL
 Mitchell Wilneff, President, Allied Benefit Systems, Inc., Chicago, IL*

Moderator: Ted A. Reese, President, Corporate Benefit Consultants, Inc., Des Plaines, IL

Special Education: Administration & Finance (FRM) Committee What's New In Special Education Funding
Turquoise A/B

There has always been 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 review the recent changes and what is expected for 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

Moderator: Michael W. Loftin, Business Manager, Southwest Co-op, Oak Forest, IL

Supply & Fixed Asset Management (MSM) Committee Tales Last Summer - GASB 34 Capital Asset Reporting in Practice
Coral

GASB 34 capital asset reporting is here to stay. This session will focus on practical steps and approaches to reporting capital assets and depreciation. Topics to discuss include: setting policies and procedures, the auditor's perspective, and annual inventories and reconciliation issues.

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

Moderator: Kevin J. Nohelty, Asst. Supt./Finance, Keeneyville Elem. SD 20, Hanover Park, IL

International Guest Speaker Performativity and the New Public Management: Issues of Entrepreneurial Public/Private
 Partnership in the Field of Site-Level School Business Management Preparation
Jade

This session will explore the tensions and synergies of working to different agendas and value systems in a context where public and private boundaries are beginning to merge and how the United Kingdom is addressing these issues.

Speaker(s): Fergus O'Sullivan, Director, International Educational Leadership Centre, Brayford Pool, Lincoln, England, UK

Moderator: Ronald E. Everett, Executive Director, Illinois ASBO, DeKalb, IL

Thursday Events

11:30 am - 12:00 pm ----- Annual Business Meeting of the Association

Salon II

As a member of Illinois ASBO, the Annual Business Meeting affords an opportunity to attend an open business meeting of your Association. Your President, Allen J. Albus, the Officers, Directors, and the Executive Director report to the membership, the financial status and comprehensive overview of the Association. In addition, new leadership positions on the Board are approved. This is your Association, your business meeting - take ownership through your participation!

12:00 pm - 1:30 pm ----- Lunch

Mega Center, Exhibit Hall

2:00 pm - 3:00 pm ----- Breakout Sessions

Accounting, Auditing & Financial Reporting (FRM) Committee CAFR Statistical Section - Changes for FY05-06

Broadway C

The Statistical Section elements for Comprehensive Annual Financial Reports (CAFR's) are changing for FY '05-06. Five broad categories of information will be required; financial trends, revenue capacity, debt capacity, demographic and economic, and operating information. Learn the specifics of this new standard so you'll be ready for next year's CAFR.

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

Moderator: Hillarie J. Siena, Dir./Business Affairs, Northfield Twp. HSD 225, Glenview, IL

Accounting, Auditing & Financial Reporting (FRM) Committee Financial Reporting in a Referendum Environment

Broadway A

Many districts are finding themselves in a referendum environment. The most important factor in a successful referendum is getting the message across to the community in a way they can understand and believe in the need. Hear from two districts that were successful in passing tax rate referendums, and get examples of information shared with the respective communities in order to be successful.

Speaker(s): Stacey L. Mallek, Exec. Dir./Business Services, East Maine SD 63, Des Plaines, IL

Patricia L. McAndrews, Dir./Business, Wheeling CCSD 21, Wheeling, IL

Moderator: Stacey L. Mallek, Exec. Dir./Business Services, East Maine SD 63, Des Plaines, IL

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

Ruby

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, Chicago, IL

Moderator: William Harkın, Asst. Supt./Business Services, Wauconda CUSD 118, Wauconda, IL

2:00 pm - 3:00 pm ----- Breakout Sessions

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Operating Student Activity Accounts
Turquoise A/B

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): Richard J. Hendricks, Asst. Supt./Business, Oak Lawn CHSD 229, Oak Lawn, IL
 Ronald C. Steigerwald, Statewide Marketing Director, Illinois Energy Consortium (IEC), Buffalo Grove, IL*

Moderator: Ronald C. Steigerwald, Statewide Marketing Director, Illinois Energy Consortium (IEC), Buffalo Grove, IL

Legal Issues (EE) Committee Legal Updates for School Business Officials
Salon II

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*

Moderator: Gary N. Frisch, Asst. Supt./Finance, Glenbard Twp. HSD 87, Glen Ellyn, IL

Maintenance & Operations (FM) Committee Green Schools
Salon VI

Is My School Green? What Makes a School Green? Chemicals, Air Quality.

*Speaker(s): Robert B. Rottersman, Sr. Environmental Consultant, Boelter & Yates, Inc., Park Ridge, IL
 David T. Velcheck, Dir./Marketing - Milwaukee, INSPEC, Inc., Milwaukee, WI
 Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Downers Grove, IL
 Sean Hoffman, Sales Manager / Branch Manager, AmSan Vonachen/Elton, Streamwood, IL*

Moderator: Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Downers Grove, IL

Management Information Systems (IM) Committee LAB: Advanced PowerPoint
Skybox 1 & 2 (Overlooking the Exhibit Hall)

Have a need to get your point across? Can't figure out how to get that chart into PowerPoint? How do I animate my slides? When should I use the auto-presentation feature? Come to this session to get these and many other questions you have with PowerPoint answered.

Speaker(s): Jeffrey K. Schroeder, Educational Services Manager, Foundation For Educational Services, Inc., Lincoln, NE

Moderator: Hal W. Shroats, Partner, Customized Relational Technology, Inc., Tinley Park, IL

Thursday Events

2:00 pm - 3:00 pm ----- Breakout Sessions

Planning & Construction (FM) Committee Adding Value with Integrated Interiors
Jade

Learning environments - be it classrooms, library/media centers or common areas - should foster a sense of imagination and discovery, maximizing the opportunity for all students to succeed. Overall, this presentation will provide participants to learn about 1) recent trends in interior educational environments for renovations, additions and new construction and 2) the economic and educational value of integrating interior architecture using professionals who are exclusively focused on the planning and design of interior learning environments.

Participants will also have the opportunity to learn about the process and how interior spaces are developed to improve comfort, interaction and a connection to the architecture of the building. Using recently designed academic spaces as examples, points we will illustrate include 1) understanding all client needs during individual space/area programming to ensure that room size and area are appropriate for the proposed purpose, 2) bringing form to these requirements in an integrated design and planning process, and gathering client input and choice at all levels of design, 3) studying how lighting, both natural and artificial, changes/enhances/enables the learning environment, 4) utilizing colors and materials to fulfill aesthetic goals and performance issues such as durability and acoustical performance and 5) selecting furniture for proper ergonomics, cost, durability and functional requirements

*Speaker(s): Kerry Leonard, Principal/Sr. Educational Facilities, OWP/P Architects, Inc., Chicago, IL
Wendy Watts, Dir./Education Interiors, OWP/P Architects, Inc., Chicago, IL*

Moderator: Grant L. Sabo, Dir./Facilities & Transportation, Berkeley SD 87, Berkeley, IL

Planning & Construction (FM) Committee Fundamentals of Good Roof Design & Maintenance
Sapphire

This one hour session will review the basic design principles of roof design from low slopes roof through to steep slope roofs. The presenters will touch on all of the fundamental elements that must be properly considered in the design of a roofing system, the available roofing systems and their components, a review of case studies of various problem areas and preventative maintenance.

*Speaker(s): Timothy J. McGrath, Dir./Architecture, BLDD Architects, Inc., Chicago, IL
Douglas T. First, Dir./Marketing - Chicago, INSPEC, Inc., Chicago, IL*

Moderator: Timothy J. McGrath, Dir./Architecture, BLDD Architects, Inc., Chicago, IL

Principles of School Finance (FRM) Committee School Finance Expenditures & Alternative Borrowing
Salon IV

The session will focus on expenditures and issues related to expenditure planning, expenditure control and alternative borrowing opportunities. We have designed the session to focus on the role of the business administrator to help the school finance novice see the many relationships that exist between accounting for and reporting expenditures. We will include a brief discussion of the real estate tax levy, basic accounting for funds, requirements of the Illinois Program Accounting Manual, and the relationship between budget planning, budgetary controls, and the legal budget.

In addition, there will be brief discussions of the administrative cost cap, financial reporting and annual audit requirements for school districts. A special feature of the session will include a discussion of alternative borrowing options including alternate revenue bonds, and lease financing options.

*Speaker(s): James D. McEnroe, Asst. Supt./Business, Tinley Park CCSD 146, Tinley Park, IL
Yasmine Dada, Assistant Superintendent, Comm. High Sch. Dist. 128, Libertyville, IL
Lynda K. Given, Partner, Chapman and Cutler, LLP, Chicago, IL*

Moderator: Stephen W. Miller, Sr. Financial Advisor, PMA Financial Network, Inc., Warrenville, IL

2:00 pm - 3:00 pm ----- Breakout Sessions

Professional Development (HRM) Committee How To Effectively Partner With Your PTO/PTA Booster & Foundations
 Salon V

Learn if you need to consider PTO, PTA, or Booster Club fundraising dollars in your revenues. How much can they contribute to your school? Are there accounting or management considerations with these funds? And what about liability?

Speaker(s): Timothy Cole, Managing Partner, William F. Gurrie & Co., Ltd., Oak Brook, IL

Moderator: Wendy J. Flaherty, Vice President, First Trust Portfolios, Lisle, IL

Public Policy & Intergovernmental Relations (EE) Committee Ethics Act
 Broadway B

The Employee Ethics Act places many new requirements on school districts and their employees. The presenter, from the Illinois Attorney General's Office, will review the law and its impact on school districts and school employees.

Speaker(s): Representative from the Attorney General's Office

Moderator: Kathleen A. Thomas, Vice President, First Trust Portfolios, Lisle, IL

Risk Management (AS) Committee School Security
 Salon III

Learn how to significantly improve your school security policies, practices, and programs with the assistance of a nationally known expert. Benefit from strategies and examples that have been successfully implemented at the school level. Don't miss this opportunity to receive real solutions to vital resources.

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

Moderator: Richard A. Lesniak, Asst. Supt./Business Services, Orland SD 135, Orland Park, IL

International Guest Speaker How School Finance Works in the UK
 Coral

In this session, you will learn how the UK schools are organized, how the government finances the schools, tax support (real estate) for schools, and national exams. There are ideas that will be shared that may provide a new perspective on how we might solve some of our school finance problems in Illinois. There will also be a Question & Answer session.

Speaker(s): Elizabeth Wood, International Educational Leadership Centre, Brayford Pool, Lincoln, England, UK

Moderator: Ronald E. Everett, Executive Director, Illinois ASBO, DeKalb, IL

3:15 pm - 4:45 pm ----- Breakout Sessions

Budgeting & Financial Planning (FRM) Committee Phasing-In Tax Rate Referenda
 Ruby

Now that the referendum has passed, how does it affect my levies under tax caps? Learn how to phase-in the tax rate increase to maximize your property tax revenue if your school district is under tax caps. This discussion includes how the limiting rate is affected, and how levies to various funds may be increased from a successful referendum to one fund.

Speaker(s): Ernest J. Tonelli, Asst. Supt./Finance & Operations, Frankfort SD 157-C, Frankfort, IL

Elizabeth M. Hennessy, Principal, William Blair & Company, Chicago, IL

Linda M. Rafanello, Vice President, Harris Trust & Savings Bank, Geneva, IL

Moderator: Jay W. Grimes, Regional Financial Consultant, IL State Board of Education, Springfield, IL

Thursday Events

3:15 pm - 4:45 pm ----- Breakout Sessions

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Health Insurance Plans: How Restructuring Can Reduce Costs
Turquoise A/B

Explore ways to control health insurance costs without impacting the level of benefit. For some that may mean streamlining the delivery system. For others that may mean going from fully funded to self-funded. This session will help to identify those things that are under your control to improve.

*Speaker(s): Patricia L. Siegel, Asst. Supt./Business, Barrington CUSD 220, Barrington, IL
Christopher Cordes, Area Sr. Vice Pres., Gallagher Benefit Services, Inc., Itasca, IL*

Moderator: Patricia L. Siegel, Asst. Supt./Business, Barrington CUSD 220, Barrington, IL

Communications (IM) Committee Voice Over IP Telephone Systems For Schools
Broadway A

Voice Over IP - What is it? How does it work, it's E-rate effect, and why are schools charging forward with it?

*Speaker(s): Jerry S. Steinberg, Sr. Consultant, Telesolutions Consultants, Bloomingdale, IL
Katia Fik, Sr. Acct. Manager/Education, SBC Communications, Hoffman Estates, IL
Mike Vozas, System Engineer, Cisco Systems, Inc., Chicago, IL*

Moderator: Susan Laff, Dir./Business Services, Burbank SD 111, Burbank, IL

Legal Issues (EE) Committee Is a Written 403(b) Plan Document on the Horizon for School Districts?
Broadway B

A panel discussion on IRS proposed changes that will affect 403(b) plans. Find out what your district should include in the implementation of a plan document. The session will address loans, hardship distributions and portability. Bring your questions to address to the IRS. A session you should not miss in preparation for the future of your district's 403(b) plans.

*Speaker(s): Kelli P. Smith, Agent, Internal Revenue Service, Chicago, IL
Richard S. Pagliaro, Asst. Supt./Business & Personnel, Joliet Twp. HSD 204, Joliet, IL
Daniel S. Gardner, Senior Employee Plans Specialist, Internal Revenue Service, Independence, OH*

Moderator: Richard S. Pagliaro, Asst. Supt./Business & Personnel, Joliet Twp. HSD 204, Joliet, IL

Maintenance & Operations (FM) Committee Playground Safety
Sapphire

Let's Swing. This session will address playground safety and design.

*Speaker(s): Daniel C. Lauder, Dir./Property Management, Property Mgmt./Catholic Schools, Rockford, IL
Joseph M. Buchholz, V.P./Sales & Owner, Buck Services Inc., West Chicago, IL*

Moderator: Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance Contractors, Inc., Downers Grove, IL

3:15 pm - 4:45 pm ----- Breakout Sessions

Planning & Construction (FM) Committee Ten Year Life Safety Surveys - 2005 Deadline
Jade

Every 10 years, on a mid-decade (1985, 1995, 2005) cycle, each school district is required to file life safety survey and safety reference plans for each facility housing staff/administration and/or students. This filing, with the regional ROE, is intended to be used for facility management, student/staff/administration safety, disaster reference for service agencies, etc. and becomes a baseline for O&M, HLS and capital development projects. The reports, for all districts, are due mid-2005 and are crucial to facility planning. Are you ready?

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

Moderator: Rhonda R. Mont, Marketing Director, Cordogan, Clark & Associates, Inc., Aurora, IL

Professional Development (HRM) Committee School District Online Web Stores/Increase Revenues
Broadway C

Increase revenues through eCommerce. Parents shop online for everything else, why not let them pay school fees, lunch, athletics, etc. through the district's online web store? The next step is to increase district revenues by selling spirit wear, athletic season tickets, theater tickets, used computer equipment, etc. to your community. Banks, integrated vendors and dedicated vendors all offer online solutions. Come and learn how and why it works, how to handle the fees and how to get started.

Speaker(s): Sherrie L. Erdenberg, Sales Representative, RevTrak, St. Charles, IL

Moderator: Mary J. Chlystek, Dir./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL

5:00 pm - 6:00 pm ----- Hospitality

New Orleans

6:00 pm - 9:30 pm ----- Recognition Banquet & Entertainment

St. Charles Ballroom (Salons)

Enjoy a wonderful dinner while sharing in the recognition of some of your colleagues. The Monarch and Lighthouse Award recipients will be recognized, as well as, the scholarship winners. Then treat your senses to the music and vocalists of the renowned, City Lights, a Chicago-based band led by Rich Daniels. Since 1974, his orchestra has been lifting spirits above the rooftops with feelings of passion, joy and bliss. Headliners such as Mel Torme, Marvin Hamlisch, Smoky Robinson, The Temptations, Chuck Berry, Jay Leno, Ray Charles and most recently Garth Brooks have all been backed by Rich and the Orchestra. This is one you won't want to miss. Join us Thursday evening for music, song and dancing - treat your senses to an unforgettable evening.

9:30 pm - 12:00 am ----- Hospitality, D.J. and Caricature Artists

St. Charles Ballroom (Salons)

End the evening with friends and great hospitality, music, dancing and caricature artists!

Friday Events

Schedule of Events: Friday, May 6, 2005

8:00 am - 8:30 am	Breakfast - <i>Salons III, IV</i>
8:30 am - 9:00 am	Updates from the Illinois State Board of Education - <i>Salons III, IV</i>
9:00 am - 9:30 am	Legislative Update from the Governor's Office - <i>Salons III, IV</i>
9:30 am - 10:30 am	Closing General Session - "Laugh Your Way to the Top: A Hilarious Guide to Achieving Your Goals" - <i>Salons III, IV</i>
10:30 am - 3:00 pm	2004-05 & 2005-06 Board of Directors' Meeting - <i>Turquoise A/B</i>

8:00 am - 8:30 am ----- **Friday Breakfast**
Salons III, IV

8:30 am - 9:00 am ----- **Update from the Illinois State Board of Education**
Salons III, IV

Join us for breakfast and updates from the Illinois State Board of Education, the Alliance and the newly formed Delegate Advisory Assembly (DAA). The DAA's purpose is to begin a process of identifying legislative issues, taking legislative positions and crafting position statements and guiding principles that will be used by the profession when it participates in state-wide policy discussions at all levels. The creation of the DAA is not the END but is the next generation of our "culture" shift to have the school business manager perspective articulated and circulated before, during and after policy matters that affect education in Illinois as they are being fashioned and implemented.

9:00 am - 9:30 am ----- **Legislative Update from the Governor's Office**
Salons III, IV

9:30 am - 10:30 am ----- **Closing General Session**
Salons III, IV

Mack Dryden "Laugh Your Way to the Top: A Hilarious Guide to Achieving Your Goals"

End the conference with "Laugh Your Way to the Top: A Hilarious Guide to Achieving Your Goals," presented by Mack Dryden, who believes that "falling on your face, is still moving forward." Mack is a comedian, actor, and writer who has appeared on numerous television shows, several feature films and whose writing and voice are heard on more than 500 radio stations every week.

10:30 am - 3:00 pm ----- **2003-2004 & 2004-2005 Board of Directors' Meeting**
Turquoise A/B

Mark Your Calendar for Future Conferences

MAY 17-19, 2006

Pheasant Run Resort
St. Charles, Illinois

MAY 16-18, 2007

Hotel Pere Marquette
Peoria, Illinois

MAY 14-16, 2008

Pheasant Run Resort
St. Charles, Illinois

MAY 13-15, 2009

Pheasant Run Resort
St. Charles, Illinois



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