

May 17-19, 2006

Pheasant Run Resort
St. Charles, Illinois

55th ANNUAL CONFERENCE AND EXHIBITIONS

Program & Exhibition Guide



ILLINOIS ASSOCIATION OF SCHOOL BUSINESS OFFICIALS
Building Tomorrow's Traditions Today

TUESDAY MEETING-AT-A-GLANCE

7:30 am - 11:30 am	Pre-Conference Seminar - Salon IV <i>Introduction to Facilities Management Seminar</i>
7:30 am - 4:00 pm	Pre-Conference Seminar - Salons I, III, IV <i>Developing the Leaders Around You</i>
11:00 am - 5:00 pm	37th Annual Golf Outing - Afternoon Scrambles only <i>Mill Creek Golf Club, Geneva OR Settler's Hill Golf Course, Batavia</i>
4:00 pm - 8:00 pm	Registration Desk Open - <i>MegaCenter Exhibit Hall</i>
4:00 pm - 8:00 pm	Exhibitors Set Up - <i>MegaCenter Exhibit Hall</i>
5:30 pm -	Post Golf Hospitality & Dinner - <i>Pheasant Run Resort, Salons I, III, IV</i>

TUESDAY EVENTS

7:30 am - 11:30 am **Pre-Conference Seminar**
Facility Designation Program (FM) Committee **Introduction to Facilities Management Seminar**
Salon IV

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

Speaker(s): *Michael Arnold, Dir./Buildings & Grounds, Sunset Ridge SD 29, Northfield, IL*
James H. Caldwell, Dir./Buildings & Grounds, Lincolnwood SD 74, Lincolnwood, IL
James A. Wuerffel, Dir./Buildings & Grounds, Park Ridge Niles CMCSO 64, Park Ridge, IL
Joseph F. Bettuzzi, Dir./Buildings & Grounds, Niles Elem. SD 71, Niles, IL
Brad A. Paulsen, Dir./K-12 Education Practice, Wight & Company, Darien, IL
George E. Klein, Retired Facilities Specialist, Lake Park HSD 108, Elk Grove, IL

Moderator: *Daniel C. Lauder, Dir./Property Management, Property Mgmt./Catholic Schools, Rockford, IL*



Michael R. English, President, PMA Financial Network, Inc., Warrenville and Alan Hahn, Dir./Finance & Business Operations, Hawthorn SD 73, Vernon Hills networked on the golf course.

TUESDAY EVENTS

7:30 am - 4:00 pm **Pre-Conference Seminar**
Professional Development (HRM) Committee..... **Developing the Leaders Around You**

*(Approved Required Strand for
Illinois Administrators' Academy Credit)*
Salon V

This seminar will take you through the steps needed to develop leaders around you. A school district or a school cannot grow unless its leadership grows. The growth process begins as leaders are trained to 1) identify other leaders, 2) learn ways to nurture and encourage them, and 3) provide them with the tools they'll need in order to perform their leadership tasks. In addition, you'll learn how to foster a productive team spirit, how to make difficult decisions, and how to handle confrontation.

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

11:00 am - 5:00 pm **37th Annual Golf Outing**
Mill Creek Golf Club, Geneva

*or
Settler's Hill Golf Course, Batavia*

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

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

5:30 pm **Post Golf Hospitality & Dinner**
*Pheasant Run Resort, St. Charles
Salons I, III, IV*



James A. Wuerffel, Dir./Buildings & Grounds, Park Ridge Niles SD 64; Ronald E. Everett, Executive Director, Illinois ASBO, DeKalb; and Terrie S. Simmons (Treasurer), Dir./Business & Finance, Sunset Ridge SD 29 were ready to hit the greens on such a cold day.

WEDNESDAY MEETING-AT-A-GLANCE: MAY 17, 2006

7:00 am - 5:00 pm	Registration Desk Open - <i>MegaCenter</i>							
7:00 am - 8:00 am	Board of Directors' Breakfast Meeting - <i>Marsalis I</i>							
7:00 am - 8:30 am	Welcome Reception - <i>Atrium</i>							
7:00 am - 11:30 am	Exhibitors Set Up - <i>MegaCenter, Exhibit Hall</i>							
9:00 am - 9:50 am	Exhibit Hall Presentation: Winning Strategies for Successful Exhibiting - <i>MegaCenter, Exhibit Hall (Tent)</i>							
8:30 am - 10:45 am	Opening General Session/Recognitions/Annual Business Meeting - <i>Salons I, III, IV</i>							
11:00 am - 12:00 pm	Breakout Sessions							
	Accounting, Auditing & Financial Reporting (FRM) Committee Board Reports - Does Your Board Understand You <i>Salon II</i>	Budgeting & Financial Planning (FRM) Committee Budgeting for Energy Costs <i>Ruby</i>	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Tips and Tools for Evaluating Financial Services <i>Jade</i>	Communications (IM) Committee Voice Over IP: Telephone Systems for Schools - Current Trends <i>Broadway A</i>	Food Service (AS) Committee Local Health Inspections - Survival of the Fittest <i>Arnold Palmer</i>	Legal Issues (EE) Committee Law and Liability Issues <i>Salon V</i>		
12:00 pm - 1:30 pm	Lunch - <i>MegaCenter, Exhibit Hall</i>							
2:00 pm - 3:00 pm	Breakout Sessions							
	12:00 pm - 4:00 pm Exhibits Open	Accounting, Auditing & Financial Reporting (FRM) Committee What You Need to Know for the 2006 Audit <i>Salon VI</i>	Budgeting & Financial Planning (FRM) Committee Is It Time to Adopt a Debt Management Policy? <i>Salon III</i>	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Ethics Legislation and Referendum Campaigns <i>Turquoise A/B</i>	Legal Issues (EE) Committee Update on Senate Bill 27 (Public Act 94-004) <i>Salon V</i>	Legal Issues (EE) Committee Legal Resources for School Administrators <i>Salon IV</i>	Maintenance & Operations (FM) Committee How Safe Are My Schools? <i>Broadway A</i>	Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee GASB 45 & Healthcare Solutions (ends at 4:45 pm) <i>Ruby</i>
3:15 pm - 4:45 pm		Breakout Sessions						
	Legal Issues (EE) Committee The Tax Cap, Issuing Debt, and the Law <i>Broadway A</i>	Maintenance & Operations (FM) Committee Building Maintenance: Preventive and Deferred <i>Salon VI</i>	Management Information Systems (IM) Committee Schools Interoperability Framework -Survivor SIF: Reality Revelations <i>Turquoise A/B</i>	Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee Long Term Care - Preparing for the Future <i>Broadway B</i>	Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee GASB 45 & Healthcare Solutions (began at 2:00 pm) <i>Ruby</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>							

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Opening General Session/Recognitions/Annual Business Meeting - <i>Salons I, III, IV</i>								
Breakout Sessions								
Maintenance & Operations (FM) Committee Grounds Management 101 <i>Salon VI</i>	Management Information Systems (IM) Committee Advanced Excel (hands-on in computer lab) <i>Preservation Hall A - LAB</i>	Principles of School Finance (FRM) Committee Managing Your Debt <i>Sapphire</i>	Professional Development (HRM) Committee Planning a Referendum? Think Strategically in Your Quest to Yes <i>Turquoise A/B</i>	Purchasing (MSM) Committee How to Save Significant Money and Reduce Your Telephone and Data Communications Bills (repeated Thurs. at 2:00 pm) <i>Coral</i>	Risk Management (AS) Committee Making Schools Safer <i>Broadway B</i>	Technology for School Finance Operations (FRM) Committee Effective Facility/Project Management Through "Help Desk" Software <i>Broadway C</i>		
Lunch - <i>MegaCenter, Exhibit Hall</i>								
Breakout Sessions								
12:00 pm - 4:00 pm Exhibits Open	Principles of School Finance (FRM) Committee Creative Revenue Enhancement (Finance Strategies) for Non-Tax Cap Districts <i>Coral</i>	Professional Development II Electronic Resource Center & Other Illinois ASBO Website Resources that Make Your Job Easier <i>Sapphire</i>	Professional Development II Illinois Resource Guide for Healthy, High Performing School Buildings <i>Broadway B</i>	Public Policy & Intergovernmental Relations (EE) Committee Referendums Under Tax Caps: The Legal and Math of the Rate Increase Factor <i>Salon II</i>	Risk Management (AS) Committee Insurance Survey Results & Analysis <i>Broadway C</i>	Strategic Planning & Instructional Support and Evaluation Programs (IM) Committee Front Page (hands-on in computer lab) <i>Preservation Hall A - LAB</i>	Technology for School Finance Operations (FRM) Committee Selecting Administrative Software – Tips and Strategies <i>Jade</i>	Transportation (AS) Committee 15-Passenger Vans: The Survey Says ... <i>Arnold Palmer</i>
	Breakout Sessions							
	Planning & Construction (FM) Committee Utility Costs 1515-1645 <i>Salon IV</i>	Professional Development II Planning for Savings on Your Energy Costs with the Illinois Energy Consortium <i>Sapphire</i>	Professional Development II Reinventing the American High School: What School Business Leaders Should Know <i>Salon III</i>	Professional Development II Financing Options for Illinois School Districts <i>Salon V</i>	Risk Management (AS) Committee Proactive Indoor Air Quality (IAQ) – A Practical Approach <i>Salon II</i>	Special Education: Administration & Finance (FRM) Committee IDEA 2004, Parentally-Placed Private School Students, and Proportionate Share <i>Broadway C</i>	Management Information Systems (IM) Committee Microsoft in Education <i>Jade</i>	
Hospitality - <i>New Orleans</i>								
Mixer: Casino Night - <i>St. Charles Ballroom (Salons)</i>								

WEDNESDAY EVENTS

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Exhibit Hall

7:00 am - 8:00 am **Board of Directors' Breakfast Meeting**
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7:00 am - 8:30 am **Welcome Reception**
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7:00 am - 11:00 am **Exhibitors Set Up**
MegaCenter, Exhibit Hall

8:30 am - 10:45 am **Opening General Session/Recognitions/Annual Business Meeting**
Salons I, III, IV

Yes I Can. Against all odds on a gridiron in South Bend, Indiana, Daniel "Rudy" Ruettiger in 27 seconds carved his name into history books as perhaps the most famous graduate of the University of Notre Dame. The son of an oil refinery worker and third of 14 children, Rudy rose from valleys of discouragement and despair to the pinnacles of success. It took years of fierce determination to overcome obstacles and criticisms, yet Rudy achieved his first dream -- to attend Notre Dame and play football for the Fighting Irish. As fans cheered RU-DY, RU-DY, he sacked the quarterback in the last 27 seconds of the only play in the only game of his college football career. He is the only player in the school's history to be carried off the field on his teammates' shoulders. Join us in welcoming RU-DY!

Recognizing Our Own. In addition, we will be recognizing those individuals who have acted in leadership roles in our Professional Development Committees and our Regional Organizations.

Annual Business Meeting of All Association Members. Your President, Ernest J. Tonelli, the Officers, Directors and the Executive Director will report to the membership on the financial status and comprehensive overview of the Association. New leadership positions on the Board are also approved. This is your Association, your business meeting – take ownership through your participation!

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

Winning Strategies for Successful Exhibiting

A representative from Incomm Center for Research & Sales Training, Chicago, will be on hand in the Exhibit Hall to offer assistance by sharing effective exhibiting techniques. Following his presentation, he will be available to answer all questions and provide input on how to make your exhibit booth more attractive and appealing.

11:00 am - 12:00 pm Breakout Session

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

Salon II

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

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

Ruby

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): Steven J. Kowalski, Sales Representative, Siemens Building Technologies, Mt. Prospect, IL

Moderator: Steven J. Kowalski, Sales Representative, Siemens Building Technologies, Mt. Prospect, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Tips and Tools for Evaluating Financial Services

Jade

Evaluating your district's current financial services through a formal "Request for Proposal" (RFP) process is usually overwhelming, but is also periodically a necessity. This session will walk you through the process of developing and evaluating an RFP for banking services that can be used in your district, including what type of information to request in order to insure that your district's current needs are met; the consideration of any future needs through the exploration and cost analysis of new products and services; how implementing new services may benefit your district; who to involve in the evaluation process and how to effectively compare proposals.

Speaker(s): Mark E. Staehlin, District Controller, Comm. High Sch. Dist. 99, Downers Grove, IL

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

WEDNESDAY EVENTS

11:00 am - 12:00 pm Breakout Session

Communications (IM) Committee Voice Over IP: Telephone Systems for Schools - Current Trends

Broadway A

Voice Over IP - What is it? How does it work, its E-rate effect, and why are schools charging forward with it? How to do classroom attendance, time cards, student lookup, etc.

Speaker(s): Carlos Avila, Regional Vice President, AT & T, Hoffman Estates, IL
Jeff Day, Regional Manager, LiteScape Technologies, Inc., Hoffman Estates, IL
Jeff Gorniak, Design Engineer II, AT & T, Hoffman Estates, IL
Robert Moskal, Sales Manager, AT & T, Hoffman Estates, IL
Ricardo Tostado, Sr. Operations Manager/Regional E-Rate Director, AT & T, Hoffman Estates, IL
Mike Vozas, System Engineer, Cisco Systems, Inc., Chicago, IL

Moderator: Katia Fik, Sr. Acct. Manager/Education, AT & T, Hoffman Estates, IL

Food Service (AS) Committee Local Health Inspections - Survival of the Fittest

Arnold Palmer

The National School Lunch Program now requires you to have your food facility inspected twice each school year. Failing these inspections can seriously impact your students' health and your revenue stream. Make sure your operation is at the "top of the food chain."

Speaker(s): Georgeen M. Ibarra, Business Manager, Speed S.E.J.A. 802, Chicago Heights, IL
Patricia A. Fournier, Asst. to Dir./Business Affairs, Lincoln Way Area Spec. Ed. Dist., New Lenox, IL

Moderator: Georgeen M. Ibarra, Business Manager, Speed S.E.J.A 802, Chicago Heights, IL

Legal Issues (EE) Committee Law and Liability Issues

Salon V

Managing liability risks for school districts in today's litigious environment can seem to be an overwhelming challenge. Everyday, new conflicts and questions arise about workers' compensation, ADA, FMLA and tort liability. Each of these areas not only present its own hazards, but must also be addressed in concert with each other. This session will deal with how to gain some sanity in approaching the liability concerns confronting Illinois school districts.

Speaker(s): Robert K. Bush, Esq., Equity Partner, Ancel, Glink, Diamond, Bush, DiCianni & Rolek, P.C., Chicago, IL

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

Maintenance & Operations (FM) Committee Grounds Management 101

Salon VI

Basics of lawn and turf care, flower beds, trees, and shrubs. How to improve your grounds and playgrounds. What's safe and what's not.

Speaker(s): George G. Bernardon, Director of Grounds Management, GCA Services Group Inc., Monroe, GA

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

11:00 am - 12:00 pm **Breakout Session**

Management Information Systems (IM) Committee..... **Advanced Excel (hands-on in computer lab)**

Preservation A

Join the speaker 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: Thomas J. Zelek, Sr., Business Manager, Elmwood Park CUSD 401, Elmwood Park, IL

Principles of School Finance (FRM) Committee **Managing Your Debt**

Sapphire

With numerous borrowing options available to school districts, it's important to have a coordinated strategy to use the right type of bonds in any given situation. In addition, a well thought out capital plan will help to determine an appropriate debt structure to ensure that borrowing capacity is available when you need it. This seminar will review debt strategies for a variety of school district situations - stable districts, tax cap districts, fast growing districts and others. We will also review the use of bond premiums and their appropriateness which was the subject of a recent series of articles in the Daily Herald.

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

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

Professional Development (HRM) Committee..... **Planning a Referendum? Think Strategically in Your Quest to Yes**

Turquoise A/B

In today's atmosphere of belt-tightening, rising gas prices, and uncertain state funding, school districts are increasingly hard pressed to make a winnable case for referenda of any kind. Despite visible overcrowding, aging facilities, changes in state and federal program mandates, and rising health care costs, taxpayers have become more and more skeptical of districts' needs and are watching their tax rates carefully.

So, how do you convince a cynical and battered public that badly needed tax rate increases and new or improved facilities are in their best interest? You can start by thinking strategically as you develop your referendum communications plan and effectively framing the process as well as your key messages.

Speaker(s): Kit Dunn, Vice Pres./Public Finance, First Trust Portfolios, LLP, Lisle, IL

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

Purchasing (MSM) Committee **How to Save Significant Money and Reduce Your Telephone and Data Communications Bills**

(repeated Thurs. at 2:00 pm)

Coral

This session will tackle the fundamentals of reading and understanding your telephone and data bills, point out common ways to evaluate and to save significant money on your telecommunications bills.

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

Moderator: Lorie M. Pilster, Coord./Business Services, Downers Grove SD 58, Downers Grove, IL

WEDNESDAY EVENTS

11:00 am - 12:00 pm **Breakout Session**

Risk Management (AS) Committee **Making Schools Safer**

Broadway B

Vandalism, suspicious packages, threats of violence, theft, etc... How can schools effectively address these issues without taking on the appearance and budget of a maximum-security facility? Benefit from this collaborative and holistic approach to school safety and security. Attendees will learn how to address today's threats, implement specific strategies and access helpful resources. Don't miss this timely and important session! Our presenter, is a trained and experienced School Crisis Assistance Team (SCAT) member and currently serves on the Illinois Terrorism Task Force. He has provided instruction to administrators and security personnel across the United States and in Canada.

Speaker(s): Paul D. Timm, President, R.E.T.A. Security, Inc., Lombard, IL

Moderator: Paul D. Timm, President, R.E.T.A. Security, Inc., Lombard, IL

Technology for School Finance Operations (FRM) Committee..... **Effective Facility/Project Management Through "Help Desk" Software**

Broadway C

Tired of responding to the same phone calls day in and day out? Tired of the lack of follow-through and ignored service requests? Please join Mark Michelini and Doug Kahler of Stevenson High School in a session where they address a new software package and strategies for "work-flow management." Initially implemented in the Information Services Department, Stevenson's Help Desk has expanded to Buildings & Grounds and HVAC services. Mark and Doug will provide an overview of the system, the rationale for its implementations and respond to questions from the group.

*Speaker(s): Mark S. Michelini, Asst. Supt./Business, Adlai E. Stevenson HSD 125, Lincolnshire, IL
Doug Kahler, Information Services, Adlai E. Stevenson HSD 125, Lincolnshire, IL*

Moderator: Paul A. O'Malley, Dir./Finance & Building Operations, Ridgeland SD 122, Oak Lawn, IL

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

MegaCenter, Exhibit Hall

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

MegaCenter, Exhibit Hall

Free to all registered attendees and all educational support personnel (pre-registration required).

2:00 pm - 3:00 pm..... **Breakout Session**

Accounting, Auditing & Financial Reporting (FRM) Committee **What You Need to Know for the 2006 Audit**

Salon VI

Accounting standards, auditing standards and regulations are constantly changing. Learn what is new for your 2006 audit from GASB, the AICPA, the federal government and the ISBE. The session will cover the principles that will need to be followed and the impact recent GASB pronouncements will have on the financial statements, what has changed in auditing standards and how that will impact audit preparation and changes in reporting requirements to the federal and state regulatory bodies.

Speaker(s): Bert G. Nuehring, Partner, Crowe Chizek & Company LLC, Oak Brook, IL

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

2:00 pm - 3:00 pm..... **Breakout Session**

Budgeting & Financial Planning (FRM) Committee..... **Is It Time to Adopt a Debt Management Policy?**

Salon III

Many school districts are issuing bonds and other debt quite frequently. Taxpayers are looking for more accountability from their Boards and Administrators. Should your district add a debt management policy to existing policies? A debt management policy can set forth guidelines for financing capital projects and short term cash flow needs. Controversial items such as capital appreciation bonds and forced premiums can be addressed in your policy. Some of the goals of the policy may include achieving more favorable interest costs and issuance costs; identifying the amount of debt to be issued and how bonds should be amortized; evaluating the services and costs being provided by a financial advisor, underwriter, bond counsel, paying agent, rating agency, and bond insurer. Examples of debt management policies will be provided.

Some of the items that can be included in the debt management policy: Role and use of Bond Counsel, Role and use of Financial Advisor, Role and use of Underwriting firm (bank or investment firm), Short Term Debt, Long Term Debt, Use of Current Interest Bonds, Use of Capital Appreciation Bonds, Use of Forced Premium, Use of Call Options, Use of Fixed Rate and Variable Rate Debt, Interest Rate Swaps, General Obligation Bonds, Limited Tax General Obligation Bonds, Working Cash Bonds, Life Safety Bonds, Debt Certificates, Use of Negotiated Sale, Competitive Sale, or Private Placement. Refunding Issues (minimum savings, current, advanced), Capital Leasing, Maintaining Debt and Payback Ratios, Preparation of the Official Statement, Credit Ratings (Moody's, Standard & Poor's, Fitch), Credit Enhancement (Bond insurance, letters of credit), Continuing Disclosure, Arbitrage Rebate, Exceptions to Rebate and Management, Internal Interim Financing, Investment of Bond Proceeds, and Modifications to Policy procedure.

*Speaker(s): Steve H. Larson, Sr. Vice President, Ehlers & Associates, Inc., Lisle, IL
David A. Holm, Asst. Supt./Business Services, Indian Prairie SD 204, Aurora, IL*

Moderator: Sharon Gitles Uslan, Manager/Midwest Area, Chevron Energy Solutions, Chicago, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee..... **Ethics Legislation and Referendum Campaigns**

Turquoise A/B

New State mandates require school district political ethics policies and revised gift ban policies. School officials have a new set of rules to live by, and maybe get caught up in, especially in hard-fought school referendum campaigns. Learn the dos and don'ts and review real-life situations.

Speaker(s): John M. Izzo, Partner/Principal, Hauser, Izzo, DeTella & Petrarca, LLC, Flossmoor, IL

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

Legal Issues (EE) Committee..... **Update on Senate Bill 27 (Public Act 94-004)**

Salon V

Senate Bill 27 passed last spring and became Public Act 94-004. Since then, rules have been adopted and school districts are seeing widespread problems regarding negotiations, salary, hiring and retiring staff. Learn about the implementation of this legislation and hear about initiatives.

*Speaker(s): Patricia A. Masterton, Assistant Superintendent, Addison Elem. SD 4, Addison, IL
Peg Agnos, Executive Director, LEND, Glen Ellyn, IL*

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

WEDNESDAY EVENTS

2:00 pm - 3:00 pm Breakout Session

Legal Issues (EE) Committee Legal Resources for School Administrators

Salon IV

This session is focused on presenting to both new and experienced business officials the most useful online and print legal resources. You will walk away with a great list of places to turn to when you need to know the specific rulings surrounding your current projects.

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

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

Maintenance & Operations (FM) Committee How Safe Are My Schools?

Broadway A

Is learning affected by Life Safety Issues? How do I create a safe learning environment? What will it cost? How does L.S. Code impact operations?

Speaker(s): *George H. Brens, Dir./Buildings & Grounds, Batavia Public SD 101, Batavia, IL*

Eric S. Sickbert, Principal, Dahlquist and Lutzow Architects, Ltd., Elgin, IL

Moderator: *Grant L. Sabo, Asst. Supt./Facilities & Transportation, Berkeley SD 87, Berkeley, IL*

Personnel, Human Relations, Benefits Administration, Labor Relations..... GASB 45 & Healthcare Solutions
and Employment Agreements (HRM) Committee

(ends at 4:45 pm)

Ruby

This session will explore the popularity of new consumer-directed health care plans (CDH) among public school districts across the country. In addition the new GASB 45 reporting for post-employment benefits other than pensions will be discussed. These two topics may not appear to be related, however, beneath the surface many solution strategies can be developed by interweaving CDH and GASB 45. Collectively, risk management strategies to control health care costs for active employees today and mitigate potential unfunded liability of providing retiree health care benefits will be presented.

Case Examples: 1) Introduction & Overview, 2) Methodology, 3) What Consumer-Directed Health Care Plans are, 4) What GASB OPEB is, 5) What your GASB OPEB responsibilities are, 6) How this new unfunded liability will affect your financial future, 7) When GASB OPEB liability needs to be recognized, 8) How to develop strategies to reduce your GASB unfunded liability and 9) How to develop effective risk management strategies incorporating CDH plans.

Speaker(s): *Richard J. Allen, Jr., President, America's VEBA Solution, Minneapolis, MN*

Darcy L. Hitesman, Esq., Principal, HaynesHitesman P.C., Minneapolis, MN

Catherine M. Loney, Vice Pres./Public Sector, GCG Financial, Inc., Bannockburn, IL

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



Mimi Wittert, Bookkeeper, Sunset Ridge SD 29 welcomes Jane Lawnicki, Asst. Dir./Budget & Finance, Indian Prairie SD 204 at the registration desk.

2:00 pm - 3:00 pm..... **Breakout Session**

Principles of School Finance (FRM) Committee **Creative Revenue Enhancement (Finance Strategies) for Non-Tax Cap Districts**

Coral

This session will focus on finances for non-tax cap districts. Creative options will be discussed. Small district superintendents and business managers are the target audience but others are welcomed.

Speaker(s): Paul A. Seymour, Business Manager, Galena USD 120, Galena, IL

Moderator: Anthony J. Cozzi, Business Manager, River Forest SD 90, River Forest, IL

Professional Development II **Electronic Resource Center & Other Illinois ASBO Website Resources that Make Your Job Easier**

Sapphire

Don't waste time reinventing the "wheel". If you need to develop documents such as 1) support staff handbooks, 2) various job descriptions, 3) requests for proposal and specifications and/or 4) policies and guidelines for record retention, learn how the Electronic Resource Center can make your life easier. It contains an online searchable database of over 700 best practices and resources in school business management which can be downloaded and modified. In addition, other Illinois ASBO web resources will be highlighted.

Speaker(s): Donald R. Johnson, Deputy Assistant Executive Director, Illinois ASBO, DeKalb, IL

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

Professional Development II **Illinois Resource Guide for Healthy, High Performing School Buildings**

Broadway B

By improving your school building atmosphere, you can improve student test scores and staff morale. Come and learn how!

Speaker(s): Deborah I. Vespa, Division Administrator, IL State Board of Education, Springfield, IL

Karen A. Shoup, Administrator/School Construction, Capital Development Board of Illinois, Springfield, IL

Moderator: Deborah I. Vespa, Division Administrator, IL State Board of Education, Springfield, IL

Public Policy & Intergovernmental Relations (EE) Committee..... **Referendums Under Tax Caps: The Legal and Math of the Rate Increase Factor**

Salon II

Planning a referendum? What is the current formula under the "Tax Cap." Come and find out how to calculate your District's Rate Increase and what the future means to your district.

Speaker(s): Todd R. Drafal, Dir./Administrative Services, Aurora West SD 129, Aurora, IL

Robert J. Bergland, Sr. Vice President, Hutchinson, Shockey, Erley & Co., Chicago, IL

Lynda K. Given, Partner, Chapman and Cutler, LLP, Chicago, IL

Wayne Wasytko, Dir./Tax Extension Dept., Lake County Clerk's Office, Waukegan, IL

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

WEDNESDAY EVENTS

2:00 pm - 3:00 pm Breakout Session

Risk Management (AS) Committee Insurance Survey Results & Analysis

Broadway C

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

*Speaker(s): James P. Kennedy, Consulting Practice Director, HUB International Illinois, Chicago, IL
Robert J. Jonak, CEBS, Sr. V.P./Client Services Manager, HUB International Illinois, Chicago, IL*

Moderator: James R. Connelly, Asst. Supt./Business, Mokena Public SD 159, Mokena, IL

Strategic Planning and Instructional Support and Evaluation Programs (IM) Committee Front Page (hands-on in computer lab)

Preservation A

Learn tips to using Front Page to easily create web pages for your District's site.

Speaker(s): Matt Sterling, Director, IT Operations, Bridger, Darien, IL

Moderator: John D. Vonder, Vice President, Medical & Municipal Funding, Northbrook, IL

Technology for School Finance Operations (FRM) Committee..... Selecting Administrative Software – Tips and Strategies

Jade

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

*Speaker(s): Christine E. Haeggquist, K-12 Marketing Specialist, Kirtley Technology Corporation, Darien, IL
Erin K. Horstman, President, Data Control & Research, Ltd., Darien, IL
Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL*

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

Transportation (AS) Committee..... 15-Passenger Vans: The Survey Says

Arnold Palmer

Research findings of how and why Illinois districts are using vans for student transportation will be presented along with an overview of state and federal laws, vehicle options, driver requirements, and ideas for improving the safety of van passengers.

Speaker(s): Mary B. Brown, Dir./Business Services, River Trails SD 26, Mt. Prospect, IL

Moderator: Tina R. Mascari, Business Manager, Lake County HS Tech, Grayslake, IL



Jennifer Nolde, Dir./Business Services, Beach Park CCSD 3, Beach Park reviews her program booklet to prepare for the conference.

3:15 pm - 4:45 pm Breakout Session

Legal Issues (EE) Committee The Tax Cap, Issuing Debt, and the Law

Broadway A

Are you a new school business official who is new to the Tax Cap and the various legal issues that impact a district's ability to issue short and long term financing in Illinois, or are you a seasoned veteran who wants to review this information and make sure you are current on recent legislation in these areas? This presentation will review the important laws of which you should be well aware, as well as review any new statutes from Springfield that will impact your District and its finances.

*Speaker(s): Tammie S. Beckwith Schallmo, Associate Director, UBS Investment Bank, Chicago, IL
Laura L. McKinney, Associate, Chapman and Cutler, LLP, Chicago, IL*

Moderator: Kristopher P. Monn, Asst. Supt./Finance, Facilities & Operations, Glen Ellyn SD 41, Glen Ellyn, IL

Maintenance & Operations (FM) Committee Building Maintenance: Preventive and Deferred

Salon VI

Goals for a Maintenance Organization: 1) Provide maximum up-time with lowest cost, and high quality, 2) Provide a high safety standard, 3) Identify and implement cost reductions, 4) Provide accurate records, 5) Collect and record cost information, 6) Optimize resources, 7) Optimize life cycle and 8) Minimize energy use.

Speaker(s): Richard Smith, Project Manager, GCA Engineering Services, Butler, PN

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

Management Information Systems (IM) Committee..... Schools Interoperability Framework -Survivor SIF: Reality Revelations

Turquoise A/B

Like Reality TV; SIF is hot. We are often asked, "What really is going on in the field?" Implementations can look very different while utilizing similar software applications, SIF agents, zone integration servers, and other tools.

This session will feature a presentation illustrating multiple school districts right here in Illinois who are using SIF technology at the district level. This is a great place to bring questions you have and ask about how you can successfully implement SIF at your school or district.

Questions to begin the discussion... (1) Is your data working for you or are you working for your data? (2) Does the task of data entry occupy an inordinate amount of your staff's time? (3) Are you considering the deployment of systems to provide the information needed to make data-driven decisions? (4) Do you have accurate data among all your systems?

We will discuss a best practices framework for leveraging the Schools Interoperability Framework to solve these challenges.

*Speaker(s): Dave Moravec, Business Development Manager, Integrity Technology Solutions, Inc., Bloomington, IL
Jason Wrage, V.P. of Application Development, Integrity Technology Solutions, Inc., Bloomington, IL*

Moderator: Dave Moravec, Business Development Manager, Integrity Technology Solutions, Inc., Bloomington, IL

WEDNESDAY EVENTS

3:15 pm - 4:45 pm Breakout Session

**Personnel, Human Relations, Benefits Administration, Labor Relations Long Term Care - Preparing for the Future
and Employment Agreements (HRM) Committee** *Broadway B*

Making sense of Long-Term Care isn't easy. Learn how this benefit could enhance your school district and protect your employees.

*Speaker(s): Christopher J. Horstman, Financial Planner, CSA, MetLife, Downers Grove, IL
Craig J. Horvath, LUTCF, CLTC, CSA, Financial Planner, MetLife Financial Services, Downers Grove, IL
James Lastres, LTC Regional Director, MetLife, Naperville, IL*

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

**Personnel, Human Relations, Benefits Administration, Labor Relations GASB 45 & Healthcare Solutions
and Employment Agreements (HRM) Committee** *(began at 2:00 pm)
Ruby*

This session will explore the popularity of new consumer-directed health care plans (CDH) among public school districts across the country. In addition the new GASB 45 reporting for post-employment benefits other than pensions will be discussed. These two topics may not appear to be related, however, beneath the surface many solution strategies can be developed by interweaving CDH and GASB 45. Collectively, risk management strategies to control health care costs for active employees today and mitigate potential unfunded liability of providing retiree health care benefits will be presented.

Case Examples: 1) Introduction & Overview, 2) Methodology, 3) What Consumer-Directed Health Care Plans are, 4) What GASB OPEB is, 5) What your GASB OPEB responsibilities are, 6) How this new unfunded liability will affect your financial future, 7) When GASB OPEB liability needs to be recognized, 8) How to develop strategies to reduce your GASB unfunded liability and 9) How to develop effective risk management strategies incorporating CDH plans.

*Speaker(s): Richard J. Allen, Jr., President, America's VEBA Solution, Minneapolis, MN
Darcy L. Hitesman, Esq., Principal, HaynesHitesman P.C., Minneapolis, MN
Catherine M. Loney, Vice Pres./Public Sector, GCG Financial, Inc., Bannockburn, IL*

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

Planning & Construction (FM) Committee Utility Costs 1515-1645

Salon IV

An overview of utility costs (Natural gas and Electric) with both overviews of natural gas supply along with long term pricing overview. The electric portion will provide an update on the status of electric service at the end of the deregulation transition period along with potential purchasing options. In addition to these speakers, Constellation NewEnergy will also have a representative.

*Speaker(s): Fred Gestel, Sales Account Executive, Nicor, Inc., Aurora, IL
Paul Crumrine, Dir./Regulatory Affairs & Compliance, ComEd, Chicago, IL*

Moderator: Leonard A. Kreger, Education Facilities Account Exec., The Trane Company, Willowbrook, IL

3:15 pm - 4:45 pm Breakout Session

Professional Development II Planning for Savings on Your Energy Costs with the Illinois Energy Consortium

Sapphire

The Illinois Energy Consortium (IEC) has provided millions of dollars of net savings for schools. 2006-07 will be challenging years for school electric service purchases. The IEC is well positioned for continuing to provide independent electric supplies to schools and provide savings. Come and hear what the IEC can do for your school district.

*Speaker(s): John Nania, Natural Gas Program Administrator, Peoples Energy Services, Naperville, IL
Louie R. Ervin, Executive Vice President, Latham & Associates Inc., Cedar Rapids, IA
David F. Grace, Superintendent, Lincoln Elem. SD 156, Calumet City, IL
Kristi Fitzanko, Account Management Executive, AmerenEnergy Marketing, Peoria, IL*

Moderator: Kimberly K. Lamansky, Secretary for Special Services, Illinois ASBO, DeKalb, IL

Professional Development II Reinventing the American High School: What School Business Leaders Should Know

Salon III

Changing the American high school is at the top of our Nation's educational agenda. It is very clear that the factory model high school where students take six or more unconnected classes each day is no longer appropriate in our global economy and society. Nationally, 40% of entering 9th graders do not graduate from high school on-time in four years. For students from disadvantaged backgrounds, the on-time graduation rate is as low as 40%.

Increasingly, studies are finding that the role of district office administrators in supporting building leaders is critical to changing high schools. Paramount is the school business leader. With limited tax dollars, the need for grant support, and the possibility of reallocating resources, school business leaders must be partners in the high school reinvention process. Minimally, there must be an understanding of WHY high schools must change, WHAT needs to change, and HOW the process works. This break-out session will provide business leaders valuable information on the high school change process.

Speaker(s): Gary M. Fields, Ph.D., Senior Consultant, International Center for Leadership in Education, Wadsworth, IL

Moderator: Holly D. Wallace, Mail/Office Clerk, Illinois ASBO, DeKalb, IL

Professional Development II Financing Options for Illinois School Districts

Salon V

This session will provide a comprehensive overview of financing options available to Illinois school districts. A resource panel with legal and financial expertise will discuss borrowing alternatives and highlight legal and financial procedures as a guide for administrators. Time will be allocated for participants to ask questions specific to their respective school districts.

*Speaker(s): Nona R. Myers, Funding Manager, Illinois Finance Authority (IFA), Springfield, IL
Timothy Stratton, Associate, Chapman and Cutler, LLP, Chicago, IL
Anne E. Noble, Managing Dir./Investment Banking, A. G. Edwards & Sons, Inc., St. Louis, MO*

Moderator: Nona R. Myers, Funding Manager, Illinois Finance Authority (IFA), Springfield, IL

WEDNESDAY EVENTS

3:15 pm - 4:45 pm Breakout Session

Risk Management (AS) Committee Proactive Indoor Air Quality (IAQ) – A Practical Approach
Salon II

Proactive IAQ programs provide many benefits including protecting occupant health, reduced liability, promoting a positive district image, early diagnosis of problems and the ability to respond to future concerns with credible facts and findings. School districts use a variety of IAQ approaches depending on need. Some protocols can provide useful information at relatively low cost while others can incur significant fees with little practical benefit. This session will provide information on how a school district can obtain the benefits of a proactive program while savings costs by selecting testing options that best suits their needs.

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

Moderator: Michael J. McHugh, Sr. Vice President, Arthur J. Gallagher & Co., Itasca, IL

Special Education: Administration & Finance (FRM) Committee.....IDEA 2004, Parentally-Placed Private School Students, and Proportionate Share
Broadway C

IDEA 2004 imposes a number of new requirements relative to parentally-placed private school students with disabilities. This session will provide participants with a careful analysis of the new requirements, review the Illinois State Board of Education's "Interim Guidance," give practical suggestions for implementation, and will review district's responsibilities regarding proportionate share. At the end of the session, participants will be able to identify and complete required/recommended implementation activities relative to parentally-placed private school students with disabilities.

Speaker(s): Teri E. Engler, Partner, Sraga, Engler, and Boyle, L.L.C., Oak Brook, IL
Andrew Eulass, Due Process Coordinator, IL State Board of Education, Springfield, IL

Moderator: Julie A. Jilek, Business Manager, AERO Special Education Co-Op, Burbank, IL

Management Information Systems (IM) Committee..... Microsoft in Education: 1) Licensing, Products & Support, 2) Data & No Child Left Behind (NCLB) and 3) Securing Your Network from Risk - Inside and Out
Jade

More major product updates and launches are scheduled over the next 18 months that at any time in Microsoft's history - Find out what Vista, Longhorn Server, Office 12, and others will mean for your district and what licensing programs are the most cost effective.

NCLB: Schools are tasked with ensuring all data between core school systems are synchronized with the correct student data. Find out the solution that quickly ensures and enforces requirements by providing data provisioning to all line-of-business applications within a school.

Security: What should your school district be concerned about and how do you properly mitigate and manage your risks.

Speaker(s): Mike Cloud, Sr. Account Manager; Peters & Associates; 909 S. Rte. 83; Elmhurst, IL

WEDNESDAY EVENTS

5:00 pm - 6:00 pm **Hospitality**
New Orleans

8:00 pm - 11:30 pm **Mixer: Casino Night**
St. Charles Ballroom (Salons)

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 D.J. 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: MAY 18, 2006

6:00 am - 7:00 am	5K Run & Walk - <i>Meet outside Golf Pro Shop at 5:45 am</i>					
7:00 am - 5:00 pm	Registration Desk Open - <i>MegaCenter</i>					
7:30 am - 9:00 am	Professional Development Committees' Planning Meeting & Breakfast - <i>Salons I, 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>					
9:30 am - 10:30 pm	Breakout Sessions					
	Accounting, Auditing & Financial Reporting (FRM) Committee ISBE Accounting Update <i>Broadway A</i>	Budgeting & Financial Planning (FRM) Committee Incorporating the "Budget at a Glance" into Your Annual Budget Presentation <i>Ruby</i>	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Is Your School District Up Against a Financial Wall? <i>Jade</i>	Legal Issues (EE) Committee Tort Lawsuits Update <i>Salon V</i>	Maintenance & Operations (FM) Committee Illinois Department of Labor (OSHA) Regulations that are Frequently Overlooked in Schools <i>Broadway B</i>	Management Information Systems (IM) Committee Budget Friendly Technology Leasing Solutions <i>Sapphire</i>
10:45 am - 11:15 am	Breakout Sessions					
	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Remote Capture Services and Check 21 Legislation -- What Do You Mean I Don't Have to Go to the Bank Anymore? <i>Ruby</i>	Legal Issues (EE) Committee The Law and School Governance <i>Salon II</i>	Legal Issues (EE) Committee School Safety Drill Act: What's Required of School Districts <i>Salon V</i>	Maintenance & Operations (FM) Committee Outsourcing: Should I? How Do I Begin? <i>Turquoise A/B</i>	Management Information Systems (IM) Committee The Future of Technology in Schools (hands-on computer lab) <i>Preservation Hall A - LAB</i>	Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee Prevention, Wellness, and Disease Management - A Powerful Combination to Control Health Care Costs <i>Broadway A</i>
12:00 pm - 1:30 pm	Lunch - <i>MegaCenter, Exhibit Hall</i>					
2:00 pm - 3:00 pm	Breakout Sessions					
	Accounting, Auditing & Financial Reporting (FRM) Committee Student Activity Funds: How to Stay Out of the Newspapers <i>Salon VI</i>	Budgeting & Financial Planning (FRM) Committee Managing "Fund 20" - Tackling the Big O & M Issues <i>Salon III</i>	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Cash Flow Planning and Short Term Borrowing Opportunities <i>Jade</i>	Legal Issues (EE) Committee Law and Labor/Personnel <i>Salon V</i>	Management Information Systems (IM) Committee Video Applications on Your Network <i>Sapphire</i>	Planning & Construction (FM) Committee Renovating for Long-Term Cost Savings <i>Broadway A</i>
3:15 pm - 4:45 pm	Breakout Sessions					
	Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Truth About Premium Bonds, Debt Limits, & Cost Effective Finance Plans <i>Jade</i>	Legal Issues (EE) Committee Law and Students <i>Broadway A</i>	Maintenance & Operations (FM) Committee Building Automation: The Latest Technology <i>Sapphire</i>	Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee Changes in ERO That You Need to Know <i>Turquoise A/B</i>		
5:00 pm - 6:00 pm	Hospitality - <i>New Orleans</i>					
6:00 pm - 12:00 am	Annual Recognition Banquet & Entertainment - <i>St. Charles Ballroom (Salons)</i>					

10:00 am - 3:00 pm Exhibits Open

THURSDAY EVENTS: MAY 18, 2006

THURSDAY MEETING-AT-A-GLANCE: MAY 18, 2006

5K Run & Walk - Meet outside Golf Pro Shop at 5:45 am							
Registration Desk Open - MegaCenter							
Professional Development Committees' Planning Meeting & Breakfast - Salons I, III, IV							
Annual Service Associate Business Meeting - Salon II							
Facility Breakfast Forum - New Orleans							
Breakout Sessions							
Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee 403(b) Plans: A Changing Landscape - What Challenges Are on the Horizon For Your District? <i>Salon VI</i>		Professional Development II U.S. Communities: Government Purchasers Saving You Money <i>Coral</i>		Public Policy & Intergovernmental Relations (EE) Committee Legislative Issues Facing School Districts, An Update From L.E.N.D. <i>Turquoise A/B</i>		Risk Management (AS) Committee Tort Expenditures, Risk Management Plans, and the Freeport Case: Now It's Personnel <i>Broadway C</i>	
				Special Education: Administration & Finance (FRM) Committee Special Education Funding - the Lack of It! <i>Arnold Palmer</i>		Technology for School Finance Operations (FRM) Committee District On-line Web Stores: Increase Revenues Through E-Commerce <i>Preservation Hall A</i>	
Breakout Sessions							
Planning & Construction (FM) Committee Life Safety - Getting More Out of Your Effort <i>Broadway B</i>		Principles of School Finance (FRM) Committee School Finance Expenditures for the Novice <i>Broadway C</i>		Professional Development (HRM) Committee Maximizing the Value of School District Shared Services <i>Salon III</i>		Professional Development II NCLB Funds: What a Business Manager Needs to Know <i>Salon VI</i>	
				Public Policy & Intergovernmental Relations (EE) Committee What's New at ISBE Finance <i>Salon IV</i>		Special Education: Administration & Finance (FRM) Committee Mandate Shortfall Relief Levies: Powerful New Tools to Pay for Underfunded Mandates Without Debt <i>Sapphire</i>	
						Supply & Fixed Asset Management (MSM) Committee GASB 34 - Covering Your Capital Assets <i>Jade</i>	
Lunch - MegaCenter, Exhibit Hall							
Breakout Sessions							
Personnel, Human Rel., Benefits Admin., Labor Rel. & Employment Agreements (HRM) Committee Collective Bargaining Issues and Strategies - New World of Negotiations <i>Turquoise A/B</i>		Principles of School Finance (FRM) Committee School Finance Revenues for the Novice <i>Broadway C</i>		Professional Development II Procurement Card: Streamlining Accounts Payable - Saving Both Time and Money <i>Broadway B</i>		Public Policy & Intergovernmental Relations (EE) Committee Tax Cap Law - The Public Relations Challenges Facing Districts Today <i>Ruby</i>	
						Purchasing (MSM) Committee How to Save Significant Money and Reduce Your Telephone and Data Communications Bills PLUS E-Rate Information <i>Coral</i>	
						Risk Management (AS) Committee Facility Use Policies, AED's <i>Salon IV</i>	
Breakout Sessions							
Planning & Construction (FM) Committee Choosing a District Architect <i>Marsalis</i>		Principles of School Finance (FRM) Committee School Finance Rev. for the Novice <i>Broadway C</i>		Prof. Development (HRM) Committee Alternative 403(b) Strategies for Proposed Changes <i>Ruby</i>		Professional Development II Illinois Energy Consortium (IEC): Impact of Deregulation Effective 1/1/2007 <i>Coral</i>	
						Risk Management (AS) Committee GASB 45 & Healthcare Solutions <i>Broadway B</i>	
Hospitality - New Orleans							
Annual Recognition Banquet & Entertainment - St. Charles Ballroom (Salons)							

10:00 am - 3:00 pm Exhibits Open

THURSDAY EVENTS: MAY 18, 2006

THURSDAY EVENTS

6:00 am - 7:00 am **5K 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 I, 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. 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 (ends at 11:15 am)**
New Orleans

Open forum discussion with facilities and building and grounds supervisors and directors. This session provides you with a chance to meet your peers 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.

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

9:30 am - 10:30 am **Breakout Session**
Accounting, Auditing & Financial Reporting (FRM) Committee **ISBE Accounting Update**
Broadway A

The session will focus on upcoming accounting changes such as, indirect costs calculations, annual financial report, financial profile and IPA manual. This session will review the upcoming change in defining a balanced budget and will review and/or inform attendees on how to implement a budget reduction plan that meets state requirements.

*Speaker(s): Craig A. Schilling, Asst. Supt./Business Affairs, Glenbrook HSD 225, Glenview, IL
 Deborah I. Vespa, Division Administrator, IL State Board of Education, Springfield, IL*

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



The 5K runners had an early start on Thursday.

9:30 am - 10:30 am.....Breakout Session Budgeting & Financial Planning (FRM) Committee.....Incorporating the “Budget at a Glance” into Your Annual Budget Presentation

Ruby

Each business manager is consistently faced with the challenge of communicating the annual budget to various audiences. The reader of the budget document can be a community member with a non-financial background or the savvy financial committee. Having one document that addresses the various skills of the reader is essential for school business managers. Due to the financial constraints that all school districts are under, the need to properly communicate the budget is more important than ever. This document provides the business manager the ability to communicate the District’s message about finances to the various stakeholders.

Speaker(s): Christopher P. Whelton, Dir./Fiscal Services, Maine Twp. HSD 207, Park Ridge, IL
John T. Reiniche, Business Manager, Orland SD 135, Orland Park, IL

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

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee.....Is Your School District Up Against a Financial Wall?

Jade

Develop Financial Remediation Plans that Maximize Options Under Illinois Law, Meet Community Needs and Consider Long Term Credit Rating Implications.

Handling cash flow and financial pressure is nothing new for School District Business Managers. But when challenges confront you, how comprehensive are your plans to turn the tide and achieve structural budgeting balance? Are you headed for severe budget cuts or a referendum that is guaranteed to garner community support? Are you synchronizing your corrective or “bridge budgeting” plans in a manner that recognizes community “hot buttons” and the referendum cycle? Are you using the independent credit rating process to bolster your case for an operating rate increase? Do you review your operating rate and bond debt service tax rates separately or do you structure them to complement each other and gain taxpayer support in the process? Can creative financing techniques allow you to “buy some time” and maintain programs while determining the right referendum questions for the community? Comprehensive alternatives analysis is often the key to making things better. Ensuring that your key administrators, board members, financial advisors, local counsel and bond counsel are all planning from the same base of information will strengthen you case. This workshop will explore strategies and methods to soften the blow of hitting the financial wall and include “real time” experiences of several districts that are scaling the financial wall with comprehensive planning, will power and execution. Be there and be informed.

Speaker(s): Spiro C. Hountalas, Director, Standard & Poor’s, Chicago, IL
Todd S. Krzyskowski, Vice President, J. P. Morgan Securities, Inc., Chicago, IL
John Kenward, Director, Standard & Poor’s, Chicago, IL
Carol L. Rogers, CPA, Dir./Business Services & Operations, Warren Twp. HSD 121, Gages Lake, IL

Moderator: Todd S. Krzyskowski, Vice President, J. P. Morgan Securities, Inc., Chicago, IL

Legal Issues (EE) Committee.....Tort Lawsuits Update

Salon V

What you need to know concerning recent Illinois judicial decisions affecting your district’s exposure to Tort Liability claims.

Speaker(s): Dawn Spivey, Attorney, Franczek Sullivan P.C., Chicago, IL
Moderator: Gary N. Frisch, Asst. Supt./Finance, Glenbard Twp. HSD 87, Glen Ellyn, IL

THURSDAY EVENTS

9:30 am - 10:30 am Breakout Session Maintenance & Operations (FM) Committee Illinois Department of Labor (OSHA) Regulations that are Frequently Overlooked in Schools

Broadway B

The Illinois Department of Labor has incorporated OSHA standards for Illinois Schools. Many of these standards are directly applicable to educational facilities however, building staff may be unaware of their existence or scope. This seminar will provide an introduction to standards commonly overlooked in schools. Examples include: lock out-tag out, confined space entry, ladders/fall protection and hazard communication. A question answer session will be included for attendees to get answers to specific challenges/concerns they may have at their district.

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

Moderator: Robert T. Ungaro, Dir./Facilities, McHenry CCSD 15, McHenry, IL

Management Information Systems (IM) Committee..... Budget Friendly Technology Leasing Solutions

Sapphire

School districts are quickly realizing the benefits of technology refreshment leases and learning the shortcomings of holding on to computers beyond their lifespan. Join us to explore the key factors to consider as you prepare your budget. this informative session will cover: 1) How leasing can save money and improve user satisfaction, 2) Evaluating leasing alternatives, 3) Implementing a refreshment program, 4) Disposing end-of-life technology and 5) Full life cycle case study: Batavia School District 101.

*Speaker(s): Jason K. Marquardt, Dir./Sales, American Capital Financial Services, Lisle, IL
John D. Vonder, Vice President, Medical & Municipal Funding, Northbrook, IL*

Moderator: Alan McCloud, Asst. Supt./Technology, Batavia Public SD 101, Batavia, IL

Personnel, Human Relations, Benefits Administration, Labor Relations..... 403(b) Plans: A Changing Landscape - What Challenges and Employment Agreements (HRM) Committee Are on the Horizon For Your District?

Salon VI

New federal legislation continues to offer districts challenges for administration, education, and compliance of their benefit plans. Learn about recent regulatory updates, proposed 403(b) regulations, and the new world of Roth 403(b) plans.

Speaker(s): Tamara M. Vaughn, Sr. V. P./Dir. Employee Benefits, Citizens Bank & Trust, Maryville, MO

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



The Professional Development Committee's Planning Breakfast was well attended.

THURSDAY EVENTS

9:30 am - 10:30 am Breakout Session Professional Development II U.S. Communities: Government Purchasers Saving You Money

Coral

The U.S. Communities program provides all local agencies in the U.S. with publicly competitively bid contracts for various products and services. Most local agencies may piggyback on a contract competitively solicited by another public agency, thereby eliminating the need to re-solicit. Through the buying power of large purchasers in the U.S. Communities program all local government agencies receive access to excellent pricing and contract terms.

U.S. Communities offers local agencies: 1) Competitively bid contracts by a lead local agency, 2) Most favorable local agency pricing, 3) No cost to participate, 4) National sponsorship by leading associations and purchasing organizations, 5) A broad range of high quality products such as office/school supplies, office furniture, industrial supplies, electrical & data comm supplies, janitorial supplies, technology product, P.E. supplies, park and playground supplies, office machines, and carpet and flooring, 6) The aggregate purchasing power of public agencies nationwide and 7) Management by public purchasing professionals.

*Speaker(s): Jeffery P. Peskuski, Government Account Manager, Graybar Electric Company, Glendale Heights, IL
Elaine D. Maheras, Education Specialist, Office Depot, Carol Stream, IL.
Diane C. Cooper, Asst. Supt./Business & Operations, Plainfield CSD 202, Plainfield, IL
Chris Robb, Central Region Manager, U.S. Communities, Stafford, VA*

Moderator: Kimberly K. Lamansky, Secretary, Illinois ASBO, DeKalb, IL

Public Policy & Intergovernmental Relations (EE) Committee Legislative Issues Facing School Districts, An Update From L.E.N.D.

Turquoise A/B

School Legislation and hot issues facing school districts today, come hear Peg Agnos from L.E.N.D. talk about these issues and what they mean for school districts.

Speaker(s): Peg Agnos, Executive Director, LEND, Glen Ellyn, IL

Moderator: Vickie L. Nissen, Asst. Supt./Business, Downers Grove SD 58, Downers Grove, IL

Risk Management (AS) Committee Tort Expenditures, Risk Management Plans, and the Freeport Case: Now It's Personnel

Broadway C

Do you charge a portion of personnel costs to the tort fund? Whether you do or not, the annual review of what is chargeable to the tort fund and what is not has taken on new urgency with the complex and confusing preliminary ruling involving several districts in the Freeport area, and with similar cases pending elsewhere. Find out why you need to have a risk management plan, why your current one may not be good enough, and how you go about getting one.

*Speaker(s): John M. Izzo, Partner/Principal, Hauser, Izzo, DeTella & Petrarca, LLC, Flossmoor, IL
Raymond A. Hauser, Principal/Partner, Hauser, Izzo, DeTella & Petrarca, LLC, Flossmoor, IL*

Moderator: James R. Connelly, Asst. Supt./Business, Mokena Public SD 159, Mokena, IL

THURSDAY EVENTS

9:30 am - 10:30 am..... **Breakout Session**
Special Education: Administration & Finance (FRM) Committee..... **Special Education Funding - the Lack of It!**

Arnold Palmer

Are you new to school business management, or an old timer who just wants more information on special education funding. You know that special ed funding isn't keeping up with the costs. You know that you need to maximize your reimbursement so that you don't lose anything you're entitled to. In this session, the speaker will discuss the types of Special Education Funds (State and Local). He will address the way these funds are claimed and review some of the claims forms. Then he will talk about federal funds and the new issues in special education funding, and give an update on the latest information on the legislation, and how it is progressing. This is a must to keep current with the major cause of increases in school expenses today.

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

Moderator: Arthur R. Keller, President, Customized Relational Technology, Inc., Tinley Park, IL

Technology for School Finance Operations (FRM) Committee..... **District On-line Web Stores: Increase Revenues Through E-Commerce**

Preservation A

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

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

MegaCenter, Exhibit Hall

Free to all registered attendees and all educational support personnel (pre-registration required).

10:45 am - 11:15 am..... **Breakout Session**

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee..... **Remote Capture Services and Check 21 Legislation -- What Do You Mean I Don't Have to Go to the Bank Anymore?**

Ruby

The implementation of the Check 21 legislation in October of 2005 created many changes in the banking industry as it concerns the clearing of checks between banks. Finds out how it affects the clearing of your district's checks and the availability of your funds. Find out about the new technology that is available in the banking industry can enable your district to make remote deposits and to ask: What Do You Mean I Don't Have to Go to the Bank Anymore?

*Speaker(s): Aimee L. Briles, V.P./Institutional Banking, Oak Brook Bank, Oak Brook, IL
Bill Barker, Vice President, Charter One Bank, Chicago, IL*

Moderator: Todd C. Sholeen, Vice President, Charter One Bank, Chicago, IL

THURSDAY EVENTS

10:45 am - 11:15 am Breakout Session Legal Issues (EE) Committee The Law and School Governance Salon II

Feeling stymied by FOIA requests? Uncertain over topics for closed session discussion? Concerned about destruction of office files? Curious whether an administrator should sign a vendor contract? Attend this back-to-basics seminar to review legal obligations and recent issues under the Open Meetings Act, Freedom of Information Act, records retention laws, bidding, ethics and gift ban, and other legislation affecting school district business and operations. Through group discussion of real life situations, participants will examine these issues and other pitfalls of general school governance (including board policy and procedures) impacting district operations.

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*

Legal Issues (EE) Committee School Safety Drill Act: What's Required of School Districts Salon V

Learn the latest rules and regulations regarding districts' administrative responsibilities for reviewing school safety plans.

Speaker(s): *Deborah I. Vespa, Division Administrator, IL State Board of Education, Springfield, IL*
John Fennell, General Counsel, Office of the State Fire Marshal, Chicago, IL
Moderator: *Gary N. Frisch, Asst. Supt./Finance, Glenbard Twp. HSD 87, Glen Ellyn, IL*

Maintenance & Operations (FM) Committee Outsourcing: Should I? How Do I Begin? Turquoise A/B

Is outsourcing right for my district? Steps to take should you decide to outsource. Union issues and the U.S. Communities Program will be discussed.

Speaker(s): *Kenneth M. Florey, Partner, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Chicago, IL*
Ruthann Kosma, Dir./Sales & Marketing, SBM Maintenance/GCA Services, Downers Grove, IL
Moderator: *Gary B. Stanley, Dir./Facilities, Aptakisic-Tripp SD 102, Buffalo Grove, IL*

Management Information Systems (IM) Committee.....The Future of Technology in Schools (hands-on in computer lab) Preservation A

What are the kids already doing with technology that we need to know?

Speaker(s): *Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL*
Moderator: *Terry Tamblyn, V. P./Dir. Educational Services, Bridger, Darien, IL*



There are many hands-on computer lab sessions offered throughout the conference.

THURSDAY EVENTS

10:45 am - 11:15 am **Breakout Session**
Personnel, Human Relations, Benefits Administration, Labor Relations **Prevention, Wellness, and Disease Management - A Powerful**
and Employment Agreements (HRM) Committee **Combination to Control Health Care Costs**

Broadway A

New options to consider when designing health benefit programs to achieve lower costs and increase productivity. Prevention and wellness case studies will be highlighted.

*Speaker(s): Debra M. Parenti, Assoc. Supt./Finance & Operations, Twp. High Sch. Dist. 214, Arlington Heights, IL
 Michael E. Wojcik, Sr. V. P./Employee Benefit Services, The Horton Group 214, Orland Park, IL*

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

Planning & Construction (FM) Committee **Life Safety - Getting More Out of Your Effort**

Broadway B

Illinois School Districts are required to meet the ISBE Life Safety requirements. The Life Safety process can be a key component of facility and financial planning for your district. Given limited resources and local political climate, districts need to use the Life Safety process to maintain their buildings in a safe condition, to support the educational environment and to educate taxpayers. Find out how you can leverage the life safety process to meet statutory requirements, integrate educational needs and sustain your buildings and district in a fiscally responsible manner.

*Speaker(s): Keith Hammelman, Lead Educational Engineer, OWP/IP Architects, Inc., Chicago, IL
 Kerry Leonard, Principal/Sr. Educational Facilities, OWP/IP Architects, Inc., Chicago, IL
 Linda M. Rafanello, Sr. Vice Pres./Man. Dir. Public Fin., PMA Financial Network, Inc., Warrenville, IL*

Moderator: Christopher J. Johnson, Account Executive, Interface Flooring Systems, Chicago, IL

Principles of School Finance (FRM) Committee **School Finance Expenditures for the Novice**

Broadway C

Review the types of expenditures commonly incurred by school districts and how to appropriately code them to the proper fund, state function code and state object code.

Speaker(s): Susan L. Husselbee, Dir./Fiscal Services, Niles Twp. HSD 219, Skokie, IL

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



There are many opportunities to meet with Service Associate members in the Exhibit Hall.

10:45 am - 11:15 am **Breakout Session**

Professional Development (HRM) Committee..... **Maximizing the Value of School District Shared Services**

Salon III

It is acknowledged that the School Districts in Illinois are providing a quality level of education for the students within the State. However, K12 funding remains an on-going issue that will continue to exacerbate until the current operating models and administrative requirements are changed. The current rationale of wanting to continue to provide (additional) monies (in the form of more General State Aid) at the recognized school district financial crisis will not solve the growing challenge; there needs to be a dramatic change/enablement in the way school districts operate.

The Illinois Legislature has the Vision to provide the vehicle within the 2004 Education Reform Act, the opportunity now exists to design and build a new school operations platform that will significantly reduce the way school districts are run, which will then enable those savings to be directed to the classroom. By borrowing from Industry, the opportunity exists to leverage the Shared Services Operations Model to enable school districts to reduce their overall administrative and operational expenses, while still maintaining their local autonomy and control.

“Feed a man a fish and you feed him for a day; teach him to fish and you feed him for a lifetime.” We now need to give our school districts the fishing pole (by incorporating a Shared Services Model), so they can meet their lifetime (operational) needs.

Mike Maher, Shared Services Practice Leader, Synch-Solutions has been instrumental in developing the operational model in support of the K12 Regional Shared Services Initiative and is a driving force in promoting the model not only in Illinois, but Wisconsin, Missouri, Michigan and Ohio. Mike will host a panel of industry and education leaders to discuss and demonstrate how Shared Services can provide a proven approach to enable school districts to reduce their administrative and operational spending while optimizing their available classroom resources.

Speaker(s): Mike Maher, Shared Services Practice Leader, Synch-Solutions, Chicago, IL

Moderator: Lisa D. Maher, Asst. Business Manager, Comm. Unit Sch. Dist. 200, Wheaton, IL

Professional Development II **NCLB Funds: What a Business Manager Needs to Know**

Salon VI

A discussion to the fiscal requirements for NCLB Funds. Supplement not Supplant, comparability and what expenditures are not allowable.

Speaker(s): Robert L. Wolfe, Principal Consultant, IL State Board of Education, Springfield, IL

Moderator: Ethelene F. Crawford, Division Supervisor, IL State Board of Education, Springfield, IL

Public Policy & Intergovernmental Relations (EE) Committee..... **What's New at ISBE Finance**

Salon IV

The Illinois State Board of Education will provide an update on new legislative initiatives, General State Aid, Mandated Categoricals and new programs. The statewide annual financial profile and annual financial reports will be discussed.

Speaker(s): Linda Riley Mitchell, Chief Financial Officer, IL State Board of Education, Chicago, IL

Elaine D. Maheras, Education Specialist, Office Depot, Carol Stream, IL.

Jeffery P. Peskuski, Government Account Manager, Graybar Electric Company, Glendale Heights, IL

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

THURSDAY EVENTS

10:45 am - 11:15 am Breakout Session

Special Education: Administration & Finance (FRM) Committee Mandate Shortfall Relief Levies: Powerful New Tools to Pay for Underfunded Mandates Without Debt
Sapphire

How are you finding the \$1-2 million or more in local funds, tax-capped or not, to pay for your special education funding deficit each year? Depleting cash reserves? Cutting everything “nonessential” to divert the cash saved? Taking on new debt? Mandates without funding, or enough funding, force schools to make up the difference “somehow” with local revenue. Tax caps add to the problem of finding local revenue to make up the shortfall. New tools--Mandate Shortfall Relief Levies--are under consideration by the General Assembly for use by schools beginning July 1, 2006 (HB 7 & HB 437). The two mandates initially covered are among the most costly: special education and student transportation. Learn how deficit spending and borrowing to cover these mandates can be virtually eliminated. Learn how to convert debt instrument dollars to revenue dollars in your district. These new tools, if they become available, promise a new era in local school finance. No bills before the General Assembly will do more to provide relief for local school finances than will HB 7 & HB 437.

Speaker(s): *Edward C. Wahl, Hazel Crest, IL*
Allan T. Smigiel, Dir./Finance, McHenry CCSD 15, McHenry, IL
Moderator: *Dale E. Mitchell, Superintendent, Homewood SD 153, Homewood, IL*

Supply & Fixed Asset Management (MSM) Committee GASB 34 - Covering Your Capital Assets
Jade

GASB 34 has had a significant impact in the way school districts report and manage capital assets. The session will focus on key characteristics of capital asset management systems, as well as: 1) How to meet GASB 34 requirements, 2) Establishing the capital asset account record, 3) Performing in-house inventories, 4) Property controls and 5) Perpetuating the property accounting system.

The discussion will be led by Mr. Martin O’Connor, Cicero Township Treasurer. Mr. O’Connor brings significant experience having managed over \$400 million capital assets for Northrop Grumman Corporation.

Speaker(s): *Martin R. O’Connor, Treasurer, Trustees of Cicero Twp. SD 39, Oak Park, IL*
Patrick J. Collins, District Manager, American Appraisal Associates, Inc., Lisle, IL
Moderator: *Barbara I. Stephani, Business Manager, Argo CHSD 217, Summit, IL*

12:00 pm - 1:30 pm Lunch
MegaCenter, Exhibit Hall

2:00 pm - 3:00 pm Breakout Session

Accounting, Auditing & Financial Reporting (FRM) Committee Student Activity Funds: How to Stay Out of the Newspapers
Salon VI

This session will provide you with the proper rules and best practices regarding the administration of activity and convenience accounts. It will also supply valuable insight as to where the problem areas are and how to effectively deal with them.

Speaker(s): *Andrew L. Mace, Principal, Miller, Cooper & Co., Ltd., Northbrook, IL*
Moderator: *Patricia McAndrews, Dir./Business, Wheeling CCSD 21, Wheeling, IL*

2:00 pm - 3:00 pm..... **Breakout Session**

Budgeting & Financial Planning (FRM) Committee..... **Managing “Fund 20” - Tackling the Big O & M Issues**

Salon III

Are your O & M costs increasing more rapidly than your revenues? Are you pushing or exceeding the 9 to 10% of total operating funds that typically go to building operating expenditures? Many school districts are using unique methods of meeting their “Fund 20” challenges such as rising operating costs, aging facilities, demands for modifications to meet new program needs, deferred maintenance, comfort issues, lack of capital funds and training staff to control costs. Understand the unique ways by which many districts are managing these challenges over time.

*Speaker(s): James B. Fritts, Highland Park, IL
Sharon Gitles Uslan, Manager/Midwest Area, Chevron Energy Solutions, Chicago, IL*

Moderator: James B. Fritts, Highland Park, IL

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee **Cash Flow Planning and Short Term Borrowing Opportunities**

Jade

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. 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. The presenters will also 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, Associate Director, UBS Investment Bank, Chicago, IL
Fenil J. Patel, Associate Vice President, PMA Financial Network, Inc., Warrenville, IL*

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

Legal Issues (EE) Committee **Law and Labor/Personnel**

Salon V

This has been an important year for personnel law changes and these two experts in school personnel law will give you the information you need to ensure legal compliance. Topics will include recent case law Public Act 94-004, overtime requirements as well as trends for the future in labor negotiations.

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

Management Information Systems (IM) Committee..... **Video Applications on Your Network**

Sapphire

How is video used in schools? IP Networks make it very economical. How are schools using IP Surveillance and IP Streaming?

Speaker(s): Rick Dawson, Vice President of Sales, IDSolutions, Valparaiso, IN

Moderator: Katia Fik, Sr. Acct. Manager/Education, AT & T, Hoffman Estates, IL

THURSDAY EVENTS

2:00 pm - 3:00 pm Breakout Session

Personnel, Human Relations, Benefits Administration, Labor Relations Collective Bargaining Issues and Strategies - New World of Negotiations

Turquoise A/B

School boards continue to deal with difficult and contentious collective bargaining issues. Many school boards continue to confront declining revenues due to reduced state aid payments, the impact of farmland reassessment, property tax assessment reductions, and the negative impact of “tax caps” in school districts subject to such revenue limitations. This seminar will give you a better understanding of the collective bargaining process, various management strategies for addressing difficult salary and fringe benefits issues, significant contract language issues, impasse and mediation strategies, and practical negotiations techniques for use in various types of negotiations – and you will enhance and sharpen your negotiations skills to allow you to get what you need at the bargaining table.

Seminar Highlights:

- The collective bargaining process
- How to deal with the “Rambo” Negotiator
- Unique bargaining strategies
- Contract language solutions to address health care, fringe benefits and salary
- TRS Salary and Sick Leave Penalties -- what you should do at the bargaining table

Speaker(s): Barney R. Mundorf, Attorney at Law, Robbins, Schwartz, Nicholas, Lifton & Taylor, Ltd., Collinsville, IL

Moderator: Jeffrey L. Endres, Dir./Business Affairs, Collinsville CSD 10, Collinsville, IL

Planning & Construction (FM) Committee Renovating for Long-Term Cost Savings

Broadway A

High Performance Schools: High performance schools provide an environment in which students can thrive as well as one that is energy efficient and easy to maintain. These goals are addressed by a single solution. A facility that is constructed and operates to provide comfort is also one that is efficient. This breakout session will review key, cost effective components of facilities and mechanical systems that improve student performance and reduce utility bills.

Speaker(s): D. William Dodds, Dir./Business Development, ARCON Associates, Inc., Lombard, IL

Frederick J. Ringe, Principal, EMA Chicago, Inc., High Lake, IL

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



Ernest J. Tonelli, Asst. Supt./Finance & Operations, Frankfort SD 157-C takes time out to meet with exhibitors.

2:00 pm - 3:00 pm **Breakout Session**

Principles of School Finance (FRM) Committee **School Finance Revenues for the Novice**

Broadway C

Learn about the property tax cycle and the ins and outs of the tax levy.

Speaker(s): Cynthia S. Cohen, Business Manager, Skokie SD 73.5, Skokie, IL

Moderator: Andrea J. Gorla, Chief Financial Officer, Cary CCSD 26, Cary, IL

Professional Development II **Procurement Card (p-Card): Streamlining Accounts Payable - Saving Both Time and Money**

Broadway B

Did your school district miss out on its share of the \$44,000 rebate distributed for 2004-05 through the Illinois ASBO p-Card Program? Come learn how to be a part of this rapidly growing program so you don't miss out again! Every time a school district issues a purchase order for less than \$2500.00, it wastes \$75.00 - \$200.00 in processing costs. That equates to 4% or MORE of the dollar value of the items being purchased. Shipping fees often get added to this as well. The current technology of a p-Card can drastically reduce these costs and improve the internal controls built into most purchasing systems. In this seminar, participants will learn 1) how to stream-line their procurement process, 2) how to customize a card for every employee selected to use a card, 3) how to use the free on-line purchasing management information system provided by the program, and 4) how the rebate program actually expands what is available to purchase all kinds of products and services. The Illinois Association of School Business Officials (Illinois ASBO) created and manages the p-Card program. Illinois ASBO, IASA, IASB and IPA sponsor it. This program is provided on a state-wide basis to: 1) reduce the legal costs of each school district setting up its own program, 2) create rebates at levels a single district could not obtain and 3) create an annual purchasing volume that provides a more favorable contract with the p-Card provider (Master Card - Harris Bank/BMO) that a single district could not create on its own. It's simple, it's state-of-the-art, it complies fully with Illinois law, it has no fees or hidden charges (totally free) and it's NOW.

*Speaker(s): Melissa R. Broemmel, Vice President/Sr. Relationship Mgr., BMO ePurchasing Solutions, Chicago, IL
Ronald E. Everett, Executive Director, Illinois ASBO, DeKalb, IL*

Moderator: Kimberly K. Lamansky, Secretary for Special Services, Illinois ASBO, DeKalb, IL

Public Policy & Intergovernmental Relations (EE) Committee **Tax Cap Law - The Public Relations Challenges Facing Districts Today**

Ruby

The recent negative press received by school districts has been challenging to the profession, to say the least. Join a panel discussion with peers who have experienced these public relation challenges first hand, and benefit from their experiences.

*Speaker(s): Jack K. Barshinger, Superintendent, Glen Ellyn SD 41, Glen Ellyn, IL
Julie Worthen, Dir. of Communications, Glen Ellyn SD 41, Glen Ellyn, IL
Rita DuChateau, Dir. of Communications, Comm. Cons. Sch. Dist. 181, Westmont, IL
Darlene Johnson, Communication Services Manager, Comm. Unit Sch. Dist. 300, Carpentersville, IL
Patricia L. Siegel, Asst. Supt./Business, Comm. Cons. Sch. Dist. 181, Westmont, IL*

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

THURSDAY EVENTS

2:00 pm - 3:00 pm Breakout Session

Purchasing (MSM) Committee How to Save Significant Money and Reduce Your Telephone and Data Communications Bills PLUS E-Rate Information
(repeat of Wed. at 11:00)
Coral

This session will tackle the fundamentals of reading and understanding your telephone and data bills, point out common ways to evaluate and to save significant money on your telecommunications bills.

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

Moderator: Lorie M. Pilster, Coord./Business Services, Downers Grove SD 58, Downers Grove, IL

Risk Management (AS) Committee Facility Use Policies, AED's
Salon IV

With religious groups, gay-straight alliances, scouting organizations, and others activated and clamoring to use your school's facilities, are you aware of what limitations the Constitution and the Equal Access Act place on your discretion to open and close the schoolhouse doors for after-school activities? Learn what your board policies on group access should look like, how to avoid civil rights lawsuits, and how to incorporate the new defibrillator requirements.

Speaker(s): John M. Izzo, Partner/Principal, Hauser, Izzo, DeTella & Petrarca, LLC, Flossmoor, IL
Rita Wojtylewski, Assistant Superintendent, Orland SD 135, Orland Park, IL

Moderator: Richard A. Lesniak, Dir./Business Services, Lockport Twp. HSD 205, Lockport, IL

3:15 pm - 4:45 pm Breakout Session

Cash Mgmt, Investments & Debt Mgmt (FRM) Committee Truth About Premium Bonds, Debt Limits, & Cost Effective Finance Plans
Jade

Has your school district ever issued premium bonds, capital appreciation bonds or a combination of the two? Are you considering such a structure in the near future? How does the decision impact long term capital project and tax rate planning of your district? Does "premium" automatically mean "more costly?" What constitutes a "back-loaded" debt structure and when is it appropriate? Better yet, how do independent parties like rating agencies view premium bonds, zero coupon bonds and back-loaded debt structures? With all of the recent media attention given to school building financings and debt limits, school business officials and board members involved in school building bonds can't afford to miss this workshop that will focus on understanding the types of bond structures that school districts use to meet tax rate objectives and long term capital project goals. Our program will include a historical perspective on school district debt limits from an Illinois Statute perspective and how they have evolved to what they are today. General Obligation school bonds come in many shapes and sizes and it helps to know the varieties. We will examine these types of bonds from a taxpayer, school administrator and investors standpoint. Attend this workshop and you will be better prepared to respond to board and community questions on the reasons bond structures were implemented. Be there and be informed.

Speaker(s): Tammie S. Beckwith Schallmo, Associate Director, UBS Investment Bank, Chicago, IL
Wendy J. Flaherty, Vice President, First Trust Portfolios, LLP, Lisle, IL
Thomas L. Chapman, Managing Director, Raymond James & Associates, Chicago, IL
Daniel L. Johnson, Partner, Chapman and Cutler, LLP, Chicago, IL

Moderator: Todd S. Krzyskowski, Vice President, J. P. Morgan Securities, Inc., Chicago, IL

3:15 pm - 4:45 pm Breakout Session
Legal Issues (EE) Committee Law and Students

Broadway A

This seminar will include discussion on equity issues, school safety, discipline, technology, and special education. This session is great for school based administrators and central office administrators alike.

Speaker(s): Daniel M. Boyle, Partner, Sraga, Engler, and Boyle, L.L.C., Oak Brook, IL
Teri E. Engler, Partner, Sraga, Engler, and Boyle, L.L.C., Oak Brook, IL
Alan T. Sraga, Partner, Sraga, Engler, and Boyle, L.L.C., Oak Brook, IL
Jennifer L. Bollero, Associate, Sraga, Engler, and Boyle, L.L.C., Oak Brook, IL

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

Maintenance & Operations (FM) Committee Building Automation: The Latest Technology

Sapphire

What's new? How to retrofit an existing building.

Speaker(s): John James, NSS/RCDD Automation/Security Reg. Mgr., Graybar Electric Company, Glendale Heights, IL
Robert A. Lanzerotti, Dir./Buildings & Grounds, North Shore SD 112, Highland Park, IL

Moderator: Richard A. Bubula, Dir./Buildings & Grounds, Downers Grove SD 58, Downers Grove, IL

Personnel, Human Relations, Benefits Administration, Labor Relations Changes in ERO That You Need to Know
and Employment Agreements (HRM) Committee

Turquoise A/B

Attorney Charlie Rose, with Franczek, Sullivan, P.C. will provide an overview of the new ERO provisions and samples of the new ERO penalty calculations.

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

Moderator: Thomas R. Beerheide, Asst. Dir./Business & Finance, Sunset Ridge SD 29, Northfield, IL

Planning & Construction (FM) Committee Choosing a District Architect

Marsalis

Illinois Qualification Based Selection (QBS) permits districts to select architects based upon experience. But what does the district need? District wide Master Planning, Demographic Analysis, Referendum Planning, Illinois Grant Assistance, Construction Grant Program Assistance, Life Cycle Analysis, Roof and Envelope, HLS, 10 year audits, O&M Program Management, or simply School Building Remodeling, New Building Design? What about integration of engineering disciplines, personality with the public? Does your architect work well in developing and administering project budgets? Share your expectations in this interactive presentation.

Speaker(s): John Cordogan, Principal, Cordogan, Clark & Associates, Inc., Aurora, IL
Michael Radakovich, Superintendent, Aurora East SD 131, Aurora, IL

Moderator: Roger Muterspaugh, Sr. Architect, Cordogan, Clark & Associates, Inc., Aurora, IL

THURSDAY EVENTS

3:15 pm - 4:45 pm Breakout Session

Principles of School Finance (FRM) Committee School Finance Revenues for the Novice

Broadway C

Learn the ins and outs of how to maximize General State Aid and the effect of tax cap on a rate increase. Federal funds will be reviewed. Augmenting your budget with outside financing.

*Speaker(s): Susan L. Shepard, Business Office Manager/Treasurer, Comm. Unit Sch. Dist. 300, Sleepy Hollow, IL
Robert J. Bergland, Sr. Vice President, Hutchinson, Shockey, Erley & Co., Chicago, IL*

Moderator: Susan L. Shepard, Business Office Manager/Treasurer, Comm. Unit Sch. Dist. 300, Sleepy Hollow, IL

Professional Development (HRM) Committee..... Alternative 403(b) Strategies for Proposed Changes

Ruby

As of January 1, 2007, the government has proposed changes to 403b Plans that will greatly impact how school districts administer these retirement plans. The proposed changes will move 403b plans closer to the current 401k platforms used by corporations. The proposed changes shift a great deal of the fiduciary responsibility of record keeping and testing from the individual participant to the school districts as the employer. The method of selecting an investment universe will most likely change as well. These proposed changes will be the first major changes to the 403b programs since they came into existence decades ago.

Kurt Yndestad has developed and executed retirement plans in both 401k and 403b programs since 1989. Kurt will describe the proposed changes and some of the possible impacts these changes will have on a school district. Kurt will illustrate how these changes might impact employees in various career stages as well how these various groups might perceive these changes. He will conclude by describing multiple strategies to meet the proposed changes.

Speaker(s): Kurt Yndestad, Sr. Vice President, Oak Brook Bank, Oak Brook, IL

Moderator: Lisa D. Maher, Asst. Business Manager, Comm. Unit Sch. Dist. 200, Wheaton, IL

Professional Development II Illinois Energy Consortium (IEC): Impact of Deregulation Effective January 1, 2007

Coral

If your school district resides in the Commonwealth Edison, Ameren Cilco, Ameren Cips or Ameren Illinois Power electric power supply area, you have the opportunity to save significant dollars on your electric bill starting this May. If you are a large district you have an additional possibility to save even more dollars.

Attend the Illinois Energy Consortium's electric deregulation seminar and learn how your school district can avail themselves of this great opportunity. If you are currently a member of the Illinois Energy Consortium, come and hear how your savings will continue.

*Speaker(s): Robert J. Latham, Ph.D., President, Latham & Associates Inc., Cedar Rapids, IA
Kristi Fitzanko, Account Management Executive, AmerenEnergy Marketing, Peoria, IL
John Nania, Natural Gas Program Administrator, Peoples Energy Services, Naperville, IL*

Moderator: Kimberly K. Lamansky, Secretary for Special Services, Illinois ASBO, DeKalb, IL

THURSDAY EVENTS

3:15 pm - 4:45 pm **Breakout Session**

Risk Management (AS) Committee **GASB 45 & Healthcare Solutions**

Broadway B

This session will explore the popularity of new consumer-directed health care plans (CDH) among public school districts across the country. In addition the new GASB 45 reporting for post-employment benefits other than pensions will be discussed. These two topics may not appear to be related, however, beneath the surface many solution strategies can be developed by interweaving CDH and GASB 45. Collectively, risk management strategies to control health care costs for active employees today and mitigate potential unfunded liability of providing retiree health care benefits will be presented.

Case Examples: 1) Introduction & Overview, 2) Methodology, 3) What Consumer-Directed Health Care Plans are, 4) What GASB OPEB is, 5) What your GASB OPEB responsibilities are, 6) How this new unfunded liability will affect your financial future, 7) When GASB OPEB liability needs to be recognized, 8) How to develop strategies to reduce your GASB unfunded liability and 9) How to develop effective risk management strategies incorporating CDH plans.

*Speaker(s): Richard J. Allen, Jr., President, America's VEBA Solution, Minneapolis, MN
Darcy L. Hitesman, Esq., Principal, HaynesHitesman P.C., Minneapolis, MN
Catherine M. Loney, Vice Pres./Public Sector, GCG Financial, Inc., Bannockburn, IL*

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

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

New Orleans

6:00 pm - 9:30 pm..... **Annual Recognition Banquet & Entertainment**

St. Charles Ballroom (Salons)

Entertainment. This multi-talented musical comedy team of Brinnon & Marks has been entertaining audiences nationwide since 1993. During their act, you'll probably see impersonations of Presidents Reagan, Clinton and Bush, along with Jimmy Stewart, Elvis Presley, Bee Gees, Tom Jones, Righteous Brothers, and the Blues Brothers, just to name a few. You'll love the Motown tributes, dancing, bluegrass, Boulderdigger Brothers, Doris & Henry and hilarious skits like Flight 77, and the muggers. The end result . . . a high energy, good clean musical comedy act that will keep everyone laughing from beginning to end.

Tribute to our Retiring Executive Director. This will be a special evening for all of us. For the members of this great Association, it will be a time to honor the man, who over the past 25 years, has given so much to the profession. And for the man being honored, it will be a night to remember and cherish.

9:30 pm - midnight..... **Hospitality**

St. Charles Ballroom (Salons)

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

FRIDAY MEETING-AT-A-GLANCE: MAY 19, 2006

8:00 am - 8:30 am	Plated Breakfast - <i>Salons I, III, IV</i>
8:30 am - 9:00 am	Update from the Governor's Office - <i>Salons I, III, IV</i>
9:00 am - 9:30 am	Update from the Alliance and Illinois ASBO's Delegate Advisory Assembly - <i>Salons I, III, IV</i>
9:30 am - 10:15 am	Closing Session - <i>Salons I, III, IV</i>
10:15 am - 10:45 am	2005-06 and 2006-07 Board of Directors' Meeting - <i>Marsalis I</i>

FRIDAY EVENTS

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

8:30 am - 9:00 am **Update from the Governor's Office**
Salons I, III, IV

After breakfast, join us for updates from the Governor's Office.

Speaker(s): Elliot Regenstein, Dir./Education Reform, Office of the Governor, Chicago, IL

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

After the update from Elliot Regenstein, join us for updates from the Alliance and Illinois ASBO's Delegate Advisory Assembly (DAA).

*Speaker(s): Todd R. Drafall, Dir./Administrative Services, Aurora West SD 129, Aurora, IL
 Calvin C. Jackson, Legislative Liaison/Prof. Dev. Consultant, Illinois ASBO, Fairbury, IL*

9:30 am - 10:15 am **Closing Session**
Salons I, III, IV

End the conference with our entertainer, George Casey. He will send you off "laughing." George has performed at Caesar's Palace, The Sahara, and is a regular act at The Riviera Hotel and Casino in Las Vegas.

10:15 am - 10:45 am **2005-06 and 2006-07 Board of Directors' Meeting**
Marsalis I

MARK YOUR CALENDAR FOR FUTURE CONFERENCES

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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