

“How Would You Handle That?”

Scenarios in Budgeting and Financial Planning

This presentation is to be informative and not to promote specific products, services companies, etc. Illinois ASBO Sponsored Programs are permitted to promote products and services in accordance with the Service Associate Ethics Policy and Code of Conduct.

Introductions

Jeff Feyerer, Speaker

- *CSBO, Fairview School District 72*

Jon Hitcho, Speaker

- *Assistant Superintendent for Business Services/CSBO,
Kildeer Countryside CCSD 96*

Jay Kahn, Speaker

- *Director of Finance and Operations/CSBO, Lake Bluff 65*

Diana McCluskey, Speaker

- *Assistant Superintendent for Finance and
Operations/CSBO, LaGrange District 102*

Kourtney Kellen, Moderator

- *Employee Benefits Consultant, Gallagher Benefit
Services*

Why This Presentation?

- Free exchange of ideas with colleagues – experienced/inexperienced
- Situational Practice
- Problem-Solving with people in the same/similar roles rarely occurs
- Application of current topics/issues from fellow CSBOs

Topics

- Health Insurance Assessment
- Target Fund Balances
- Tax Levy Philosophy
- Negotiations/Projections
- Budgeting in a New Job
- Referendum/Forecasting/Community

What We're Looking For

- Not just a solution
- Ideas, process
- What questions need to be asked?
- Quick thinking
- ALL Group discussion about solutions



Topic #1

Health Insurance Assessment

Topic #2

Target Fund Balances

Topic #3

Tax Levy Philosophy

Topic #4

Negotiations/Projections

Topic #5

Budgeting in a New Job

Topic #6

Referendum and Forecasting for the Community

Questions and Answers

We thank you for your time!

Presenters:

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