

# Illinois ASBO Member Programs

How can we help your district?

Illinois ASBO Annual Conference 2023



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# Introductions

**Dr. Michael Jacoby**, Executive Director/CEO, Illinois ASBO

**Holly Wallace**, Sr. Member Programs Manager, Illinois ASBO

**Fenil Patel**, PMA representing ISDLAF

**Haj Young**, representing IEC Powered by Future Green

**Jim Toledo**, representing Frontline Education

**Whitney Dyson**, representing American Fidelity

**Chris Surdenik**, representing Constellation Telecom



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# Illinois ASBO Member Programs

## Illinois ASBO Mission

To provide our members and stakeholders with a comprehensive range of professional development activities, services and advocacy through inclusive networking and participation



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# Illinois ASBO Member Programs

- **IASBO, IASA, IASB**

- ISDLAF
- IEC powered by Future Green
- ISEBC
- MSEBP
- Frontline Education (Forecast 5)

- **IASBO, IASA, IASB, IPA**

- Pcard Program
- **IASBO**
  - American Fidelity
  - Constellation Telecom



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# Illinois ASBO-Created Programs

These programs were created by school business officials, for business officials to meet an established need in the industry.

- ISDLAF+
- P-Card
- IEC Powered by Future Green

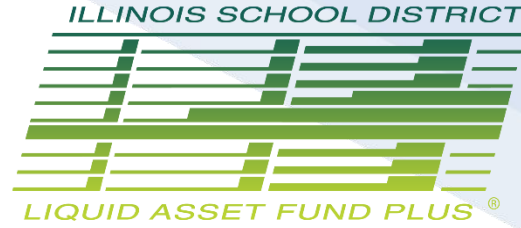


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**PMA**<sup>TM</sup>



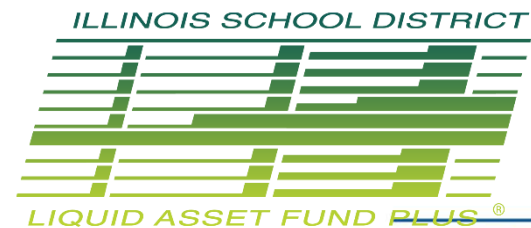
## ISDLAF Overview

**Fenil Patel**  
Senior Vice President

May 5, 2023

# Illinois School District Liquid Asset Fund ISDLAF+

- The Illinois School District Liquid Asset Fund Plus (ISDLAF+) is an investment opportunity for school districts, community college districts, Cook County Township school treasurers and educational service regions.
- Over 400 Illinois School Participants
- Sponsored by the Three IL School Associations
  - Illinois Association of School Business Officials
  - Illinois Association of School Boards
  - Illinois Association of School Administrators



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# ISDLAF Services

- The Multi-Class Series
- LTD Series
- Fixed Income Investments
- Cash Flow Management Program
- Quarterly Statewide Seminars
  - October Levy Seminar

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# ISDLAF Services

- Cash Flow Analysis
  - Formal organization of projected inflows and outflows
  - Maximize interest income
  - Intended for investment purposes only
- Bond Proceeds Management
  - Arbitrage Compliance
  - Maximize bond proceeds interest
- Risk Management Program
  - Investment objectives
  - Credit quality
- Allowable Investments
  - District's Portfolio

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# IEC Powered by Future Green



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# p-Card Program

The Illinois ASBO p-Card Program is a credit card program created BY school business officials that is used in 1400+ school district in 24 states.

Completely Free and you receive Rebate

- Based on spend and payment timing

Runs on the Master Card platform

**p-Card**  
Payment Card

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# A credit card program with controls

- Different than a “normal” credit card
- Based on School District finances not an individual’s ss number
- You decide access to corporate limit
- Individual parameters and credit limit
- More Controls: transaction limits/transaction number in cycle
- MCC blocking



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# Alliance-Created Programs

**These programs were created and are run by Alliance association executive directors, with proceeds feeding back into the associations.**

- ISEBC
- MSEBP



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# ISEBC

## Illinois Schools Employee Benefits Consortium

Co-sponsored by Illinois ASBO, IASA), and IASB, the Illinois Schools Employee Benefits Consortium (ISEBC) includes a proprietary fully insured, comprehensive group health insurance plan that will offer member school districts the opportunity to provide employees health benefits at affordable premiums.

- **American Central Insurance Services**
  - Abe Lincoln, Central Illinois Valley, Corn Belt, Illini, Kaskaskia, Two Rivers and Western
- **Clemens and Associates, Inc.:**
  - Egyptian, Shawnee, Kaskaskia, Southwestern and Wabash Valley
- **J. Krug:**
  - Blackhawk, Kishwaukee, Boone, DeKalb and Winnebago, Northwest and Starved Rock
- **James Unland & Company, Inc.:**
  - Western, Knox County, Central Illinois Valley, Peoria, Tazewell and Woodford counties



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# MSEBP

## The Metropolitan School Employee Benefits Program

Co-sponsored by Illinois ASBO, IASA, and IASB, the MSEBP provides comprehensive employee benefits to school districts.

- Mesirow Financial
  - Cook, DuPage, Kane, Kendall, Lake, McHenry and Will counties.



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# Affinity Programs

Solicited or brought to Illinois ASBO by outside partners, these programs provide discounts, offers or services to you as an Illinois ASBO member benefit.

- Frontline Education
- American Fidelity
- Constellation Telecom



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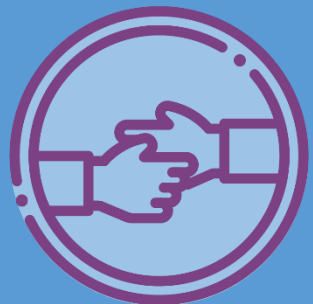
FOCUS: K-12 SCHOOLS

SERVING

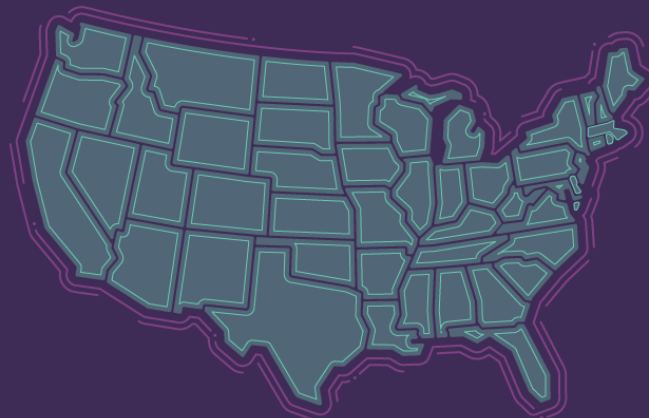


EDUCATIONAL ORGANIZATIONS

80,000 SCHOOLS



IN ALL 50 STATES



2.4 MILLION TEACHERS



# What We've Learned from Our Partnerships

Education leaders are looking for:



Operational efficiency



Connected systems that talk to each other



Actionable, real-time reporting



Data & insights for proactive decision-making



Confidence in compliance



# Who We Are

**School administration software** purpose-built for K-12 to empower educators.

We provide innovative, connected solutions for student and special programs, business operations, and human capital management with powerful data and analytics.



# American Fidelity

Over 30,000 Employees Say...

92%



**Satisfaction With Account Manager**  
92% of individuals report being Very Satisfied or Satisfied with the guided support from an account manager during in-person or virtual enrollments.<sup>1</sup>

84%



**Seek Individual Support**  
84% of employees said they want individual support when completing their benefits enrollment.<sup>2</sup>



12%

**Self-Education Isn't Preferred**  
Only about 12% said they prefer self-education on benefits and enrolling on their own.<sup>5</sup>

<sup>1, 3, 4</sup> American Fidelity internal post -enrollment survey data accessed July 2020, data from January to June 2020.  
<sup>2, 5</sup> American Fidelity internal post -enrollment survey data accessed July 2020, data from July 2019 to June 2020.



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- Hospital Indemnity Carrier
- Cancer Carrier
- Critical Illness Carrier
- Short Term Disability Carrier
- Long Term Disability Carrier
- Accident Carrier
- Term Life Carrier
- Perm Life Carrier
- Section 125 Administration
- 403B Administration
- Flex Provider
- Online Platform Provider
- HSA Administrator
- ACA Support



AMERICAN FIDELITY   
a different opinion

ESB-8159 -0920

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## Administrative Services

- Section 125 Administration
- Flexible Spending Accounts
- Health Savings Accounts
- Health Reimbursement Arrangements
- Pre-Tax Transportation Benefits
- Non-Discrimination Testing
- Dependent Verification Review
- ACA Tracking & Reporting
- Payroll Upload File
- 403b & 457 Plan Administration

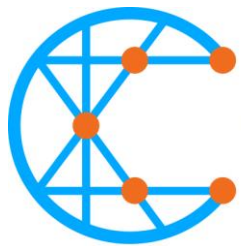
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AMERICAN FIDELITY   
a different opinion

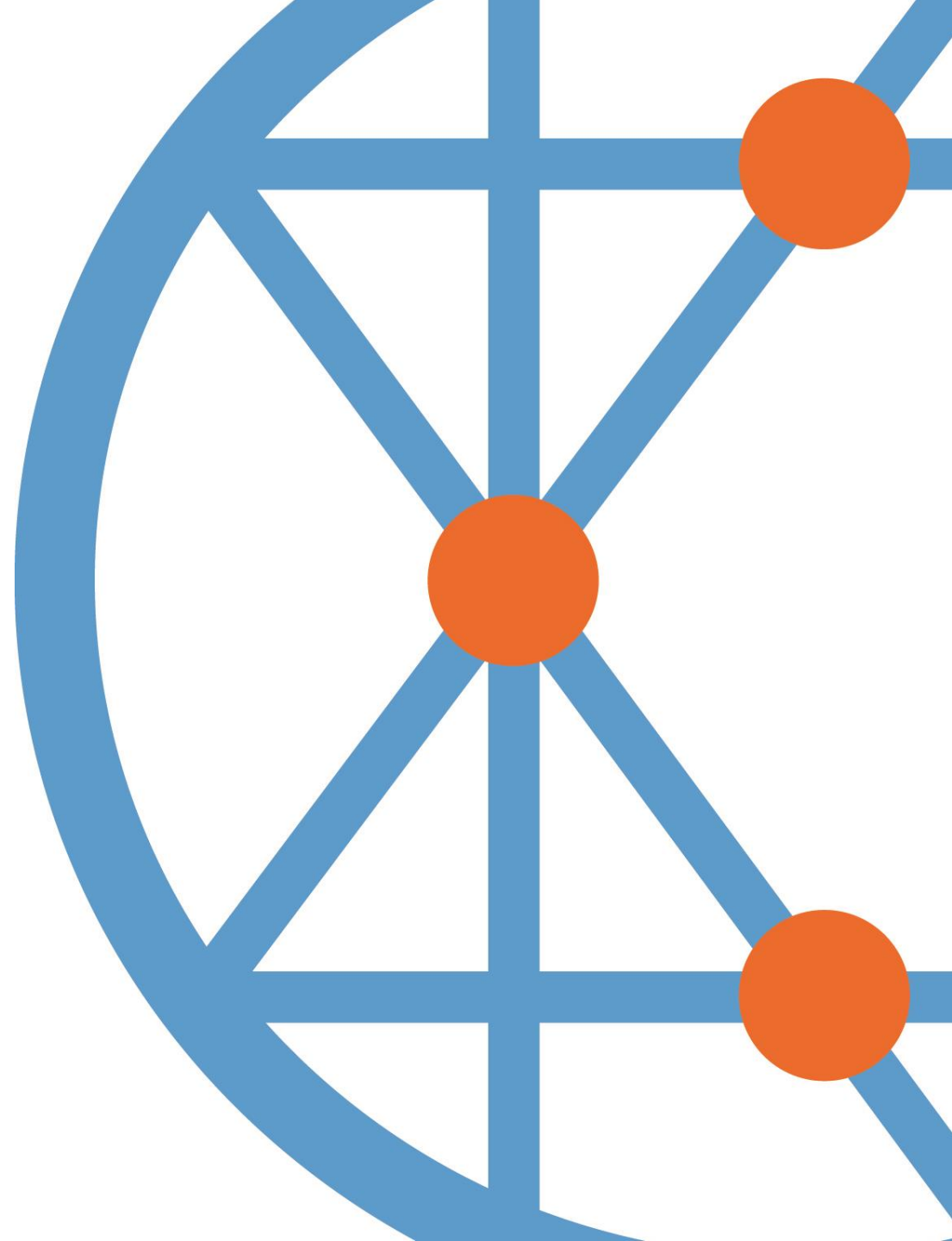
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5  
Telecom Insights

Connected

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# Questions and Answers

*We thank you for your time!*



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**For more information on Illinois ASBO Member Programs:**

**<https://www.iasbo.org/tools/programs-services/programs>**

Or contact:

Holly Wallace; Sr. Member Programs Manager  
**[hwallace@iasbo.org](mailto:hwallace@iasbo.org)**



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