

CITY OF WEST CHICAGO

WHERE HISTORY & PROGRESS MEET

FINANCE COMMITTEE

MONDAY, MAY 6, 2024
6:30 P.M.¹ – CITY COUNCIL CHAMBERS

AGENDA

1. Call to Order, Roll Call, and Establishment of a Quorum
2. Approval of Minutes
 - A. Finance Committee Meeting Minutes of March 4, 2024
3. Public Participation / Presentations
4. Items for Consent
 - A. Resolution No. 24-R-0036 – Write Off of General Corp Fund and Water and Sewer Fund Bad Debts
 - B. Resolution No. 24-R-0044 – Leadership Development Program
5. Items for Discussion
6. Unfinished Business
7. New Business
8. Reports from Staff
9. Executive Session (if needed)
10. Adjournment

¹Rescheduled from 6:00 P.M.

CITY OF WEST CHICAGO – 475 Main Street
FINANCE COMMITTEE MINUTES
Regular Meeting
March 4, 2024

1. Call to Order, Roll Call and Establishment of a Quorum

Alderman Dimas called the meeting to order at 6:30 p.m. on March 4, 2024 and acknowledged that Alderman Swiatek provided proper and timely notice to participate remotely. Roll call found Daniel M. Beebe, Christine Dettmann, Sandy Dimas, Jayme Sheahan, Rebecca Stout and Chris Swiatek present. Alderman Joseph C. Morano was absent. Alderman Dimas announced a quorum.

Staff in attendance: City Administrator Michael Guttman, Finance Director Nikki Giles, Assistant City Administrator Tia Messino, Assistant Finance Director Diana Soltess, Community Development Director Tom Dabareiner and Management Fellow Brady Fisher.

2. Finance Committee Meeting Minutes of December 4, 2023.

Alderman Stout made a motion, seconded by Alderman Dettmann, to approve the minutes of December 4, 2023. All Aldermen voted Aye by voice vote. Motion carried.

3. Public Participation / Presentations

4. Items for Consent

- A. Ordinance No. 24-O-0006 – Carryover Budget Amendment
- B. Ordinance No. 24-O-0008 – Permit Fees
- C. Resolution No. 24-R-0025 – Purchasing Manual

City Administrator Michael Guttman explained that the Carryover Budget Amendment is being requested because when the budget process starts in September or October, it is believed the full budgeted amount for certain projects will be spent. However, due to unforeseen circumstances, funds are not used at times and can be carried over to the new Fiscal Year. He noted that in addition to the items listed in Exhibit A, the Space Needs Study was approved by the Infrastructure Committee for a new City Hall. The Finance Committee will be considering a property tax increase to fund the debt associated with the construction of a new City Hall. The City Council has also discussed the possibility of having the redevelopment be more than just for a new City Hall, like including an open space for festivals. He also said there is still remaining contamination from the junkyard that needs to be removed before the City can proceed.

Community Development Director Tom Dabareiner said the last time permit fees were increased was in 2018. He said the new Building Permit Fee Schedule was compared to surrounding communities. He said with the new fees, in some cases, the base fee will remain the same and small projects usually require one inspection so there will be no

need for any additional inspection fees. He also said the new single-family construction residential fees will have no changes and noted that there will now be a permit needed to replace a hot water heater tank.

Alderman Dettmann asked if a permit fee for a chairlift, if needed for a resident with a disability, can be waived or reduced. The City Administrator said staff will review and provide an update at a later date.

Management Fellow Brady Fisher said the City's Purchasing Manual was last approved in 1998. He said the Manual should be updated periodically to reflect new laws, clean-up general language and changes in the organization. He provided an overview of the changes being made to the Purchasing Manual. He also said that before the Ordinance can be presented to the City Council the Table of Contents, edits to exhibits and any Finance Committee suggestions need to be finalized.

Alderman Morano arrived at 6:37pm.

Alderman Stout commented on the Purchasing Manual update stating it is good practice to update the manual to follow with state policies.

Alderman Stout moved and Alderman Dettmann seconded a motion to approve the Consent Agenda. Voting Aye: Alderman Beebe, Dettmann, Dimas, Morano, Sheahan, Stout and Swiatek. Voting Nay: 0. Motion carried.

5. Items for Discussion.

6. Unfinished Business.

7. New Business.

8. Reports from Staff.

9. Executive Session (if needed).

10. Adjournment.

At 6:40 p.m., Alderman Stout made a motion, seconded by Alderman Sheahan, to adjourn the meeting. All Aldermen voted Aye by voice vote.

Respectfully submitted,

Josie Avilez

CITY OF WEST CHICAGO

FINANCE COMMITTEE
AGENDA ITEM SUMMARY

ITEM TITLE:

General, Water and Sewer Funds Uncollectible Debts
Resolution No. 2024-R-0036

AGENDA ITEM NUMBER: 4. A.

FILE NUMBER: _____

COMMITTEE AGENDA DATE: 05/06/2024

COUNCIL AGENDA DATE: 05/06/2024

STAFF REVIEW: Nikki Giles, Finance Director

SIGNATURE 

APPROVED BY CITY ADMINISTRATOR:

SIGNATURE _____

ITEM SUMMARY:

While establishing relationships with Linebarger Goggan Blair & Sampson LLP and the State of Illinois for participation in the Illinois Debt Recovery Program to allow for additional methods of collecting amounts due and owing to the City, some debts have been deemed as uncollectible, meaning that there is no longer any reasonable expectation that the debt will be repaid. An account can become uncollectible for many reasons, including the debtor's bankruptcy, inability to locate the debtor, or, in some cases, the unpaid debt had gone uncollected prior to the Deed Certification process put in place by the City in 2005. The attached listing represents debts identified as uncollectible and therefore should be removed from City ledgers.

ACTIONS PROPOSED:

Recommend approval of the referenced Resolution to allow for the write off of uncollectible debts.

COMMITTEE RECOMMENDATION:

This item is being presented to the Finance Committee for consideration prior to the City Council meeting.

RESOLUTION NO. 24-R-0036

A RESOLUTION AUTHORIZING THE WRITE OFF OF GENERAL CORPORATE FUND BAD DEBTS IN THE AMOUNT OF \$37,599.53 AND WATER AND SEWER FUND BAD DEBTS IN THE AMOUNT OF \$132,156.69

WHEREAS, the City of West Chicago has provided a chargeable service to certain persons and said persons refuse to pay the City for the same; and

WHEREAS, property of the City has been damaged due to acts of certain individuals and said persons refuse to reimburse the City for damaged property or billed for licenses; and

WHEREAS, the City has exhausted all methods available to effect payment or reimbursement without incurring expenditures which are not cost effective.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of West Chicago, in regular session assembled, that the following amounts be written off the funds indicated, listed in Exhibits "A" and "B" attached.

"A"	General Corporate Fund:	\$37,599.53
"B"	Water and Sewer Fund:	\$132,156.69

ADOPTED this 6th day of May 2024.

AYES: _____

NAYES: _____

ABSTAIN: _____

ABSENT: _____

Mayor, Ruben Pineda

ATTEST:

Executive Office Manager, Valeria Perez

A

Account #	Name	Invoice Date	Invoice Number	Amount	Purpose
443	Agincourt Co, LLC	9/30/2005	GCM0000062	\$1,822.88	Engineering Fees
2484	Gabriel Mitchell	10/25/2007	DCP0000009	\$2,236.05	Property Damage
2482	Joshua Schild	10/25/2007	DCP0000011	\$2,287.00	Property Damage
2483	Jorge Jimenez	10/25/2007	DCP0000010	\$2,287.00	Property Damage
2362	Paula Fink/Nick Stilin	9/17/2008	GCR0000069	\$1,728.31	Rent and late fees
2697	David Sosa	5/1/2009	DCP0000020	\$165.70	Property Damage
2697	David Sosa	5/7/2009	GCM0000117	\$120.62	Delinquency Charge
2757	Bill Monty's Warehouse	8/10/2009	QAB000842	\$200.00	False Alarm Billing
2757	Bill Monty's Warehouse	8/18/2009	GCM0000121	\$200.00	Delinquency Charge
2781	Jorge Rivero	10/12/2009	DCV0000003	\$129.57	Property Damage
2784	David Jard	10/13/2009	DCP0000025	\$3,390.18	Property Damage
2789	Fontana Blue	3/10/2010	QAB0000856	\$300.00	False Alarm Billing
2825	Chang Lee	3/19/2010	ENF0000220	\$1,251.90	Engineering Fees
2840	Ianno Santo	5/11/2010	QAB0000865	\$100.00	False Alarm Billing
362	Cliff's Body Shop	5/11/2010	QAB0000879	\$200.00	False Alarm Billing
2848	Silverstar Entertainment	5/12/2010	QAB0000897	\$200.00	False Alarm Billing
37	Crossroads Chevrolet	5/12/2010	QAB0000898	\$300.00	False Alarm Billing
2855	T Station 3A Management	5/12/2010	QAB0000926	\$500.00	False Alarm Billing
2825	Chang Lee	5/17/2010	GCM0000232	\$250.38	Delinquency Charge
362	Cliff's Body Shop	6/17/2010	GCM0000245	\$200.00	Delinquency Charge
2789	Fontana Blue	6/17/2010	GCM0000251	\$300.00	Delinquency Charge
2840	Ianno Santo	6/17/2010	GCM0000257	\$100.00	Delinquency Charge
2848	Silverstar Entertainment	6/17/2010	GCM0000260	\$200.00	Delinquency Charge
37	Crossroads Chevrolet	6/17/2010	GCM0000246	\$300.00	Delinquency Charge
2855	T Station 3A Management	6/17/2010	GCM0000263	\$500.00	Delinquency Charge
2825	Chang Lee	6/18/2010	GCM0000271	\$300.46	Delinquency Charge
2825	Chang Lee	7/26/2010	GCM0000278	\$360.55	Delinquency Charge
2825	Chang Lee	8/18/2010	GCM0000287	\$432.66	Delinquency Charge
2825	Chang Lee	9/23/2010	GCM0000296	\$519.19	Delinquency Charge
2825	Chang Lee	11/24/2010	GCM0000302	\$1,370.66	Delinquency Charge
2825	Chang Lee	1/11/2011	GCM0000308	\$750.00	Delinquency Charge
2825	Chang Lee	1/28/2011	GCM0000313	\$750.00	Delinquency Charge
2825	Chang Lee	2/28/2011	GCM0000318	\$750.00	Delinquency Charge
2825	Chang Lee	4/11/2011	GCM0000321	\$750.00	Delinquency Charge
2825	Chang Lee	5/11/2011	GCM0000324	\$750.00	Delinquency Charge
2825	Chang Lee	6/17/2011	GCM0000329	\$750.00	Delinquency Charge
3038	Julieta Zetina	6/27/2011	DCP00000035	\$496.42	Property Damage
2825	Chang Lee	8/4/2011	GCM0000333	\$1,500.00	Delinquency Charge
2825	Chang Lee	9/19/2011	GCM0000338	\$750.00	Delinquency Charge
2825	Chang Lee	10/21/2011	GCM0000339	\$750.00	Delinquency Charge
2825	Chang Lee	1/10/2012	GCM0000342	\$2,250.00	Delinquency Charge
2825	Chang Lee	2/27/2012	GCM0000348	\$750.00	Delinquency Charge
2825	Chang Lee	3/16/2012	GCM0000349	\$750.00	Delinquency Charge
2825	Chang Lee	5/18/2012	GCM0000351	\$2,250.00	Delinquency Charge
1326	Itasca Construction	12/7/2012	ENF0000228	\$1,350.00	Engineering Fees

GeneralCorporate Fund Total

\$37,599.53

B

02674-02	Del Valle, Alejandro	8/1/2002	\$86.45	Final Billed Amount
00322-01	Williams, Jamie	8/8/2002	\$32.12	Final Billed Amount
01105-02	Gonzalez, Ismael	8/8/2002	\$58.62	Final Billed Amount
01216-01	Carter, John	8/8/2002	\$47.60	Final Billed Amount
01540-01	Casas, Jorge	8/8/2022	\$37.40	Final Billed Amount
01672-01	Dominguez, Jorge	8/8/2002	\$178.35	Final Billed Amount
02029-02	Knight, Pat	8/8/2002	\$76.01	Final Billed Amount
03838-01	Kapolas, Peter	8/8/2002	\$159.76	Final Billed Amount
00610-01	Oertel, Lorinda	9/4/2002	\$111.51	Final Billed Amount
02704-01	Nenuz, Frances	9/4/2002	\$740.22	Final Billed Amount
00136-04	Jasso Ricardo	10/10/2002	\$22.45	Final Billed Amount
00935-02	Jensen, Jill	10/10/2002	\$36.70	Final Billed Amount
01889-02	Andrews, Sherry	10/10/2002	\$57.15	Final Billed Amount
02342-03	Sanchez, Hermilo	10/10/2002	\$81.21	Final Billed Amount
02507-01	Flores, Rudolfe	10/10/2002	\$132.68	Final Billed Amount
02562-01	Soria, Juan	10/10/2002	\$82.17	Final Billed Amount
03146-02	Nowland, David	10/10/2002	\$149.25	Final Billed Amount
04503-01	Adams, David	10/10/2002	\$41.77	Final Billed Amount
04947-01	Family Tool	10/10/2002	\$251.08	Final Billed Amount
04948-01	Family Tool	10/10/2002	\$57.34	Final Billed Amount
05089-01	Andersen LLP Arthur	10/10/2002	\$26.62	Final Billed Amount
05462-04	AAM MFG Inc	10/10/2002	\$81.59	Final Billed Amount
05510-03	Steel & Craft	10/10/2002	\$37.21	Final Billed Amount
06254-02	Hock, Mary	10/10/2002	\$96.52	Final Billed Amount
00069-01	Furniture Outlet	11/15/2002	\$44.63	Final Billed Amount
02467-01	McMullen, Charles	11/15/2002	\$92.00	Final Billed Amount
02681-01	Avalos, Pasqual	11/15/2002	\$90.46	Final Billed Amount
02987-01	Clark Oil	11/15/2002	\$49.67	Final Billed Amount
03946-01	Severa, Renee	11/15/2002	\$26.60	Final Billed Amount
03997-06	Hebets, Melvin	11/15/2002	\$286.85	Final Billed Amount
04245-04	Berzynski, Gary	11/15/2002	\$31.12	Final Billed Amount
01270-01	Murphy, George	12/10/2002	\$123.35	Final Billed Amount
04636-03	Technanogy/Laura Pentecost	12/12/2002	\$53.01	Final Billed Amount
04637-02	Technanogy/Laura Pentecost	12/12/2002	\$121.67	Final Billed Amount
00074-01	Store #2672 Burger King	1/10/2003	\$502.32	Bankruptcy
00537-03	Cholula, Carlos	1/10/2003	\$23.24	Final Billed Amount
00802-01	Gonzalez, Raymon	1/10/2003	\$46.34	Final Billed Amount
03429-01	Pearce, Steve	1/10/2003	\$28.36	Final Billed Amount
06030-01	Ameriking #13550	1/23/2003	\$498.51	Bankruptcy
01676-01	Weiser, Dave	2/4/2003	\$176.43	Final Billed Amount
02164-01	Prill, David	2/4/2003	\$24.87	Final Billed Amount
02061-01	Wheeler, Darren	3/11/2003	\$15.93	Final Billed Amount
00424-01	Brarajas, Ramon	4/3/2003	\$5.68	Final Billed Amount
01026-01	Fetting & Thomas	4/3/2003	\$661.31	Final Billed Amount
04584-02	Borjon, Juan	4/3/2003	\$26.76	Final Billed Amount
05469-04	Wood, Richard	4/3/2003	\$254.56	Final Billed Amount
06254-04	Wansk, Alex	4/7/2003	\$436.87	Final Billed Amount
00619-04	Jones, Amy	5/9/2003	\$26.78	Final Billed Amount

00932-01	Finnegan, Daniel	5/9/2003	\$20.17	Final Billed Amount
01888-02	Varela, Elvira	5/9/2003	\$1,722.17	Final Billed Amount
00743-01	Janetzki, Bryan	6/13/2003	\$138.65	Final Billed Amount
03354-01	Browski, Brian	6/13/2003	\$99.93	Final Billed Amount
00875-02	Shumate, Darla & David	7/9/2003	\$181.43	Final Billed Amount
04529-02	Major, Robert	7/9/2003	\$169.08	Final Billed Amount
06079-02	Butler, Rick	7/9/2003	\$15.98	Final Billed Amount
00020-02	Hansen, Amy	8/1/2003	\$218.37	Final Billed Amount
00136-07	Sanchez, Norma	8/1/2003	\$99.87	Final Billed Amount
00453-01	Bitler, Michael	8/8/2003	\$114.38	Final Billed Amount
01676-02	Countrywide Mortgage	8/8/2003	\$68.34	Final Billed Amount
02074-01	Hayes, Michael	8/8/2003	\$318.76	Final Billed Amount
06009-01	Hofabuer, Adele	8/8/2003	\$102.43	Final Billed Amount
06150-03	Eubank, Neil	8/8/2003	\$7.63	Final Billed Amount
03520-02	Luka, Daniel	8/9/2004	\$46.01	Final Billed Amount
06109-02	Joshi, Nimisha	8/9/2004	\$103.47	Final Billed Amount
00048-01	Melton, Richard	9/4/2003	\$110.93	Final Billed Amount
02017-03	Martinez, Maria	9/4/2003	\$322.47	Final Billed Amount
04136-02	Simpson, Tim	9/4/2003	\$130.50	Final Billed Amount
00011-03	Sanchez, Luis	10/1/2003	\$107.59	Final Billed Amount
01240-03	Armstrong, Marie	10/3/2003	\$117.98	Final Billed Amount
03012-01	Toll, Helma	10/3/2003	\$105.03	Final Billed Amount
04219-01	Perham, Marti	10/3/2003	\$107.00	Final Billed Amount
01219-04	Resident	11/7/2003	\$80.01	Final Billed Amount
01836-01	Guzman, Octavio	11/7/2003	\$49.72	Final Billed Amount
02930-01	Stoudt, Joe	11/7/2003	\$69.61	Final Billed Amount
04582-02	Halfpenny, Brett	11/7/2003	\$211.61	Final Billed Amount
06434-01	Alpha Title, Inc	11/7/2003	\$82.35	Final Billed Amount
00495-02	Maldonado, Norma	12/4/2003	\$23.82	Final Billed Amount
03730-02	Bocanegra, Alexander	12/4/2003	\$166.73	Final Billed Amount
02354-01	Aranda, John	1/9/2004	\$89.68	Final Billed Amount
03208-01	Kiser, Gregory	1/9/2004	\$56.08	Final Billed Amount
03310-03	Morrone, Frank	1/9/2004	\$227.13	Final Billed Amount
06360-02	Rodrigurz, Juan	1/9/2004	\$48.18	Final Billed Amount
00011-05	Ortiz, Carlos	2/1/2004	\$178.16	Final Billed Amount
00053-05	Romero Properties	2/12/2004	\$3.72	Final Billed Amount
01423-01	Boudette, Barbara	2/12/2004	\$5.73	Final Billed Amount
02166-02	Villalobos, Emma	2/12/2004	\$2.66	Final Billed Amount
03113-02	Delgado, Julio	2/12/2004	\$206.36	Final Billed Amount
03314-01	Adams, John	2/12/2004	\$171.90	Final Billed Amount
04034-01	Bright, Dorothy	2/12/2004	\$20.31	Final Billed Amount
00136-10	Breese, Lori	3/5/2004	\$80.00	Final Billed Amount
03054-02	Carmona, Francisco	3/5/2004	\$219.95	Final Billed Amount
03066-01	Kesselhuth, Viola	3/5/2004	\$216.14	Final Billed Amount
04081-02	Creekside Partners	3/5/2004	\$21.10	Final Billed Amount
00725-02	Perez, Blanca	4/9/2004	\$717.00	Final Billed Amount
01184-02	Hernandez, Adela	4/9/2004	\$266.87	Final Billed Amount
01203-01	Fenske, Cheryl	4/9/2004	\$67.93	Final Billed Amount
02079-02	Beauchamp, Richard	4/9/2004	\$91.72	Final Billed Amount

02373-01	Hernandez, Hector	4/9/2004		\$192.64	Final Billed Amount
02504-00	Mendoza, Jose	4/9/2004		\$257.84	Final Billed Amount
03784-02	McCall, Jeff	4/9/2004		\$131.91	Final Billed Amount
05774-02	Barrera, Refujio	4/9/2004		\$141.11	Final Billed Amount
01333-01	Munoz, Oscar	5/10/2004		\$87.55	Final Billed Amount
01475-01	Lewis Sr, Issac	5/10/2004		\$71.89	Final Billed Amount
01808-02	Garcia, Gerardo	5/10/2004		\$168.45	Final Billed Amount
01824-02	Alvarez, Abel	5/10/2004		\$59.31	Final Billed Amount
01827-03	Escamilia, Elizabeth	5/10/2004		\$11.44	Final Billed Amount
00573-05	Correa, Jose	6/3/2004		\$115.98	Final Billed Amount
00611-01	Stewart, Leanne	6/3/2004		\$127.11	Final Billed Amount
01779-02	Holland, Hans	6/3/2004		\$199.26	Final Billed Amount
02185-01	Hitzemann, Ray	6/3/2004		\$20.03	Final Billed Amount
02344-01	Kunhart, John	6/3/2004		\$215.69	Final Billed Amount
01198-03	Figuroa, Jose	7/9/2004		\$74.98	Final Billed Amount
01300-02	Quiroz, Jose & Sonia	7/9/2004		\$57.77	Final Billed Amount
02700-02	Castro, Elena	7/9/2004		\$361.63	Final Billed Amount
03046-01	Sills, Richard	7/9/2004		\$154.18	Final Billed Amount
03226-01	Adeleye, Lawrence	7/9/2004		\$10.54	Final Billed Amount
04147-01	Sentman, Jeff	7/9/2004		\$198.85	Final Billed Amount
04245-05	Dawson, Rebecca	7/9/2004		\$120.34	Final Billed Amount
01823-02	Garcia, Leopoldo	8/6/2004		\$263.23	Final Billed Amount
02502-01	Guerrero, Joel	8/6/2004		\$104.17	Final Billed Amount
02827-03	Wyrowsky, James	8/6/2004		\$454.16	Final Billed Amount
06584-01	Grande Terre, LLC	8/6/2004		\$2,350.54	Final Billed Amount
02807-01	Greerm Scott	9/2/2004		\$164.21	Final Billed Amount
01532-01	Lopez, labier	10/6/2004		\$101.34	Final Billed Amount
01827-04	Soto, Saul	10/6/2004		\$427.94	Final Billed Amount
02098-02	Jackson, Charles	10/6/2004		\$26.07	Final Billed Amount
02768-02	Brodycz, Anna	10/6/2004		\$14.26	Final Billed Amount
03326-02	Turnage, Stacey	10/6/2004		\$191.18	Final Billed Amount
04045-01	Bejarano, Leopoldo	10/6/2004		\$63.04	Final Billed Amount
04890-02	Subway	10/6/2004		\$489.72	Final Billed Amount
05972-01	Bestler, Juanita	10/6/2004		\$116.86	Final Billed Amount
01237-01	Hernandez, Joaquim	10/14/2004		\$12.94	Final Billed Amount
00311-01	Borodin, Andrew	11/10/2004		\$98.64	Final Billed Amount
02740-01	Harper, Timothy	11/10/2004		\$43.78	Final Billed Amount
03119-03	Belmonte, Jose	11/10/2004		\$59.63	Final Billed Amount
06179-02	Mirror Image	11/10/2004		\$414.56	Final Billed Amount
01751-01	Escalante, Eliseo	12/6/2004		\$46.79	Final Billed Amount
02128-01	Pedziwiatr, Tom	12/6/2004		\$14.75	Final Billed Amount
04838-02	Collar Country Floor Covering	12/6/2004		\$312.94	Final Billed Amount
04084-03	Parra, Craig	1/5/2005		\$80.35	Final Billed Amount
02654-02	Sanchez, Luis	1/11/2005		\$109.26	Final Billed Amount
00136-11	Puerla, Asiel	3/7/2005		\$72.30	Final Billed Amount
00294-01	Sunkist Cleaners	3/7/2005		\$252.11	Final Billed Amount
01733-01	Rubio, Jose Manuel	3/7/2005		\$12.40	Final Billed Amount
02525-01	Sadowski, Ken	3/7/2005		\$273.11	Final Billed Amount
04034-02	Kraft, Mary	3/7/2005		\$101.96	Final Billed Amount

05980-01	Gifford, Roy	3/7/2005	\$24.10	Final Billed Amount
01040-02	Toxqui, Ismael	4/7/2005	\$448.88	Final Billed Amount
04164-04	Cruz, R	4/7/2005	\$90.24	Final Billed Amount
06010-02	Contreras, Gloria	4/7/2005	\$56.13	Final Billed Amount
03072-01	Feistamel, Carl	5/1/2005	\$361.11	Final Billed Amount
01583-01	Huerta, Alejandro	5/5/2005	\$93.11	Final Billed Amount
03609-01	Bahrenburg, Brook & Laura	5/5/2005	\$225.13	Final Billed Amount
05585-02	Campbell, Patrick	5/5/2005	\$23.57	Final Billed Amount
02066-02	Great Midwest Real Estate	6/1/2005	\$21.89	Final Billed Amount
00596-03	Urbina, Yemi	6/2/2005	\$332.21	Final Billed Amount
01540-03	Ingrassia, Anne	6/2/2005	\$327.44	Final Billed Amount
01776-03	Allen, Charles	6/2/2005	\$161.29	Final Billed Amount
02525-02	Greenwich Investors	6/2/2005	\$23.59	Final Billed Amount
04482-01	Pedraza, Rogelio	6/2/2005	\$64.87	Final Billed Amount
04639-01	Printed Packaging	6/2/2005	\$33.98	Final Billed Amount
04831-01	Marsh Custom Woodworking	6/2/2005	\$109.32	Final Billed Amount
05628-02	Khan, Liaquat	6/2/2005	\$27.75	Final Billed Amount
06739-01	Portfolio Homes	6/2/2005	\$76.89	Final Billed Amount
04657-02	Flint, Inc	7/7/2005	\$118.13	Final Billed Amount
06786-01	Portfolio Homes	8/12/2005	\$778.94	Final Billed Amount
01576-03	Muffoletto, Joann	9/16/2005	\$104.08	Final Billed Amount
04038-01	Keller, Nicole	9/16/2005	\$92.12	Final Billed Amount
06583-01	Quizno's	9/16/2005	\$134.56	Final Billed Amount
04872-01	Commerical Carriers	10/4/2005	\$112.19	Final Billed Amount
02066-03	Allen, Sharon	10/7/2005	\$135.78	Final Billed Amount
02633-01	Miller, John	10/7/2005	\$118.73	Final Billed Amount
03724-03	Ayalia, Obdulia	10/7/2005	\$114.15	Final Billed Amount
04083-06	Smothers, Katherine	10/5/2005	\$220.57	Final Billed Amount
04340-01	Gardner, Garrett	11/4/2005	\$73.29	Final Billed Amount
05895-01	Penzialek, Gertrude	12/12/2005	\$5.23	Final Billed Amount
03066-03	Allen, Tracy	1/1/2006	\$149.73	Final Billed Amount
03122-02	Latham, Kenneth	1/1/2006	\$248.10	Final Billed Amount
00654-03	Telles, Martina	1/19/2006	\$199.82	Final Billed Amount
01530-03	Cortez, Maria	1/19/2006	\$293.11	Final Billed Amount
02310-03	Duran, Gilberto	1/19/2006	\$63.08	Final Billed Amount
00016-01	Leathersmiths	2/1/2006	\$58.57	Final Billed Amount
01223-02	Campos, Laura	2/1/2006	\$37.22	Final Billed Amount
02438-01	Flores, Rafael	2/1/2006	\$347.53	Final Billed Amount
02639-03	Hernandez, Antonio	2/1/2006	\$101.33	Final Billed Amount
02681-02	Manriquez, Guadalupe	2/1/2006	\$427.41	Final Billed Amount
06006-02	Kelly, Mark	2/1/2006	\$92.65	Final Billed Amount
06151-04	Benner, Sue	2/1/2006	\$127.79	Final Billed Amount
06252-03	Wessman, Nancy	2/1/2006	\$142.62	Final Billed Amount
06598-02	Rider, Dwight	2/1/2006	\$32.55	Final Billed Amount
04186-02	Clayton, Kathleen	2/6/2006	\$111.57	Final Billed Amount
04495-01	Bloom, Sandra	2/6/2006	\$12.34	Final Billed Amount
06895-01	Portfolio Homes	4/25/2006	\$23.12	Final Billed Amount
05008-01	Smart Papers	5/1/2006	\$792.10	Bankruptcy
05009-01	Smart Papers	5/1/2006	\$49.51	Bankruptcy

05100-01	Smart Papers	5/1/2006	\$1,165.53	Bankruptcy
05101-01	Smart Papers	5/1/2006	\$491.39	Bankruptcy
06776-01	Smart Papers	5/1/2006	\$213.43	Bankruptcy
05014-01	Yamada America	7/3/2006	\$5.87	Final Billed Amount
04853-02	Vector Engineering	7/12/2006	\$71.87	Final Billed Amount
04991-01	WinCup	9/13/2006	\$106.52	Final Billed Amount
00247-00	Portfolio Homes	10/31/2006	\$247.35	Final Billed Amount
00253-02	Jones, Ron	12/1/2006	\$125.31	Final Billed Amount
06788-01	Portfolio Homes	1/22/2007	\$10.67	Final Billed Amount
01213-03	Corona, Hector	3/21/2007	\$546.73	Final Billed Amount
03369-03	Kresch, Ed	4/4/2007	\$42.28	Final Billed Amount
01453-00	Portfolio Homes	5/21/2007	\$39.02	Final Billed Amount
06609-01	Portfolio Homes	8/2/2007	\$43.22	Final Billed Amount
03037-01	Geroulis, Nick	12/4/2007	\$30.66	Final Billed Amount
04258-02	Countrywide Field Services	12/6/2007	\$79.35	Final Billed Amount
00885-01	Gibson, Robert	12/10/2007	\$24.21	Final Billed Amount
00289-02	Hometown Realty	1/14/2008	\$39.00	Final Billed Amount
00966-03	Garcia, Pablo	1/15/2008	\$76.08	Final Billed Amount
03443-01	Landriault, Cathy	1/31/2008	\$103.02	Final Billed Amount
04071-02	Mendez, Francisco	10/7/2008	\$207.56	Final Billed Amount
05566-01	Fllaherty, Sean	11/6/2008	\$56.82	Foreclosure
05577-01	Miller, Fred	11/12/2008	\$137.29	Foreclosure
06597-06	Kerchner, Wendy	12/22/2008	\$74.40	Final Billed Amount
06694-02	Zenteno, Sandra	3/19/2009	\$130.22	Sheriff's Sale
00235-01	Pepe's Chido	3/20/2009	\$1,141.90	Final Billed Amount
04824-01	Heriaud Brothers	4/20/2009	\$365.72	Final Billed Amount
02425-02	Rincones, Bertha	4/28/2009	\$3,515.47	Bankruptcy
04652-02	Sema, Inc	7/2/2009	\$349.39	Final Billed Amount
02652-05	Wells Fargo Bank	12/7/2009	\$72.45	Final Billed Amount
05067-01	Cameron Upholstery	1/2/2010	\$148.97	Water Service Disconnect
04838-04	Elite Cabinetry	2/16/2010	\$62.80	Final Billed Amount
04839-04	Elite Cabinetry	2/16/2010	\$33.35	Final Billed Amount
04853-03	Autumn Woods Racing	2/17/2010	\$127.96	Final Billed Amount
04640-03	Green Tree Lawncare	3/4/2010	\$39.32	Final Billed Amount
05896-02	Poling, Derek	6/8/2010	\$56.60	Final Billed Amount
04847-02	Constar Plastics	3/1/2011	\$5,003.76	Bankruptcy
04496-07	McQueen, Ivy	4/7/2011	\$189.72	Final Billed Amount
02488-01	Munday, James	6/1/2011	\$2,113.25	Bankruptcy
02050-01	WC Terrace	4/27/2012	\$4,635.65	Final Billed Amount
06630-03	Blakely, James	5/7/2012	\$244.67	Final Billed Amount
06931-01	Christyn Homes	7/6/2012	\$1,669.98	Final Billed Amount
05888-02	Godbold, Sue	8/29/2012	\$28.67	Final Billed Amount
04880-02	Action Team Group	11/8/2012	\$1,046.78	Final Billed Amount
04648-05	Triple A Painitng	9/21/2012	\$227.09	Final Billed Amount
05865-02	Smolecki, Kenneth	1/2/2014	\$89.17	Final Billed Amount
04847-03	Constar Plastics	4/1/2014	\$35,122.98	Bankruptcy
05824-02	Nishio, Kaneya	12/22/2014	\$38.04	Final Billed Amount
02050-03	WCT West Chicago, LLC	10/19/2017	\$40,363.30	Bankruptcy
			<u>\$132,156.69</u>	

CITY OF WEST CHICAGO

**FINANCE COMMITTEE
AGENDA ITEM SUMMARY**

ITEM TITLE:

Resolution No. 24-R-0044 – Executive Coaching Proposal

AGENDA ITEM NUMBER: 4. B.

FILE NUMBER: _____

COMMITTEE AGENDA DATE: 5/6/2024

COUNCIL AGENDA DATE: 5/6/2024

STAFF REVIEW:

SIGNATURE _____

APPROVED BY CITY ADMINISTRATOR:

SIGNATURE _____

ITEM SUMMARY:

One of our mutual goals for the organization is to create a program to ensure our current and future managers have the skills they need to effectively lead their respective components of the organization. As I shared last year, I was working to find a consultant to help with this program.

After an extensive search and a host of conversations, I believe we have found an executive coach who will work extremely well with our team and greatly benefit our organization.

Please see the attached proposal from Sarah Schillerstrom, owner of SRSD Consulting, LLC.

STAFF RECOMMENDATION:

Staff recommends the approval of Resolution No. 24-R-0044.

COMMITTEE RECOMMENDATION:

The Finance Committee is reviewing this item prior to the City Council meeting, though the proposal was provided to the elected officials several weeks in advance of the meetings.

RESOLUTION NO. 24-R-0044

**A RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR TO EXECUTE
AN AGREEMENT WITH SRSD CONSULTING, INC. –
LEADERSHIP DEVELOPMENT PROGRAM**

BE IT RESOLVED by the City Council in regular session assembled that the City Administrator is hereby authorized to execute an Agreement with SRSD Consulting Inc. to implement a Leadership Development Program in an amount not to exceed \$66,550, a copy of which is attached hereto and incorporated herein as Exhibit "A".

APPROVED this 6th day of May 2024.

AYES: _____

NAYES: _____

ABSTAIN: _____

ABSENT: _____

Mayor Ruben Pineda

ATTEST:

Executive Office Manager Valeria Perez

City of West Chicago

Executive Coaching Proposal

April 11, 2024



www.sarahschillerstrom.com

Primary Contact Person: Sarah Schillerstrom

sarah@sarahschillerstrom.com

773-453-5596

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Company Profile

SRSD is a management coaching and consulting firm that believes public servants deserve a workplace where they have opportunities to grow and develop, are supported by strong leaders, and are valued for their contributions.

SRSD supports public sector organizations in developing and implementing strategies to retain their best people, cultivate strong leadership and future successors, and to intentionally create an organizational culture that people want to embrace.

By utilizing a coaching approach and drawing on the principles of Energy Leadership™, SRSD identifies the root causes and barriers to progress to guide individuals, teams, and organizations in effecting incremental, consistent, and impactful change.

SRSD is owned and operated by Sarah Schillerstrom, who has 17 years of experience in local government, including 10 years as a Human Resources Director, and is a certified professional coach.

Coach Bio

Sarah Schillerstrom

With a successful career in local government spanning nearly two decades, Sarah quickly rose through the ranks and held multiple positions across various departments, including Public Works, Administrative Services, Human Resources, and the Village Manager's Office. During her tenure, she served as the Human Resources Director for almost a decade and concluded her service as the Deputy Village Manager. She started her career as a L.P. Cookingham-Noll Fellow and Budget Analyst with the City of Kansas City, MO.

Sarah founded SRSD Consulting, LLC because she believes public servants deserve a workplace where they have opportunities to grow and develop, are supported by strong leaders, and are valued for their contributions.

SRSD supports public sector organizations in developing and implementing strategies to retain their best people, cultivate strong leadership and future successors, and intentionally create an organizational culture that people want to embrace.

As a certified professional coach, Sarah utilizes a coaching approach and draws on the principles of Energy Leadership™, to identify the root causes and barriers to progress, and guide individuals, teams, and organizations in effecting incremental, consistent, and impactful change.



Understanding of the Project

SRSD Consulting, LLC is pleased to present a proposal to provide select members of the executive leadership team a professional coaching program that utilizes the best practices in professional coaching and creates an opportunity for participants to experience professional coaching in a group setting. This group coaching program is intended to create an environment by which participants can learn to apply practical concepts to their current duties, as well as provide an opportunity to further develop their

supervisory, managerial, and leadership skills. Participants will also learn professional coaching skills that can be used as leaders.

Approach to the Project

This group coaching program aims to create a lasting impact on participants by fostering professional and leadership development and encouraging the practical application of the concepts discussed.

What sets this group coaching program apart is the inclusion of ongoing pod coaching meetings between monthly group coaching sessions, specifically designed to reinforce the application of acquired concepts and insights gained. This approach ensures consistent and incremental progress over time. Additionally, participants learn to establish personalized systems that help them remain accountable for advancing toward their goals.

The benefit of the pod coaching meetings also includes creating an environment for participants to work with colleagues in other departments, establish and build relationships, gain different perspectives, and an opportunity to utilize the concepts to address current challenges. The pod assignments can also be curated to deliberately build relationships across specific departments.

Energy Leadership Framework

The consultant will use the concept of Energy Leadership ([explanatory video](#)) as the foundation of which to build support for the program and the coaching process.

Coaching Program Format

The group coaching program is intended to be 12 months and consists of the following components:

- **Assessments and Information:** Participants will complete three assessments and a “Client Intake Form” prior to the start of the program.
 - **Energy Leadership Index:** The Energy Leadership Index, also referred to as the E.L.I., assessment offers a unique reflection on a leader’s perceptions, attitudes, behaviors, and leadership capabilities. Unlike personality assessments, the E.L.I. measures energy based on attitudes, allowing for change. The assessment reveals energy levels in catabolic-suppressing and anabolic-inspirational ranges, guiding them towards improved performance. [Explanatory Video](#).
 - **EQ-I 2.0 360:** The EQ-i 2.0 360 assessment provides insights into an individual's emotional intelligence skills, which can be valuable for enhancing interpersonal relationships, managing stress, making effective decisions, and achieving personal and professional success.
 - **CliftonStrengths:** The CliftonStrengths assessment is a valuable tool for individuals and organizations seeking to maximize potential by focusing on what individuals do best naturally. It emphasizes a positive approach to personal and professional development based on the philosophy that everyone has unique talents that can be cultivated for greater effectiveness and fulfillment.

- **Client Intake Form:** Each participant will be asked to complete a “client in-take” form via Microsoft Forms. The purpose of this form is to collect background information about each participant and to initiate the self-reflection process regarding what they want to get out of the program and what is most important to them.
- **Get to Know You Sessions:** Prior to the group coaching sessions, each participant will meet one on one with the coach for approximately 1 hour to review and discuss career progression, life circumstances, intentions for the program and review the assessment results.
- **Monthly Group Training:** All participants will attend a series of twelve (12) two (2) hour monthly training sessions. Below is a summary of the topics covered in each monthly group training (note: these may be subject to change based on the needs of the group)
 - Month 1: Basic Leadership concepts
 - Month 2: Self Awareness and Values
 - Month 3: Energy Leadership
 - Month 4: Relationships and Power Dynamics
 - Month 5: Communication – A Leaders’s Role
 - Month 6: Engaging with Conflict
 - Month 7: Managing Performance
 - Month 8: Managing Relationships (EQ)
 - Month 9: Influencing Others
 - Month 10: Problem Solving
 - Month 11: Time Management and Productivity
 - Month 12: Personal Wellness
- **Pod Coaching:** The participants will be assigned to a pod of 4–5 participants required to meet between the monthly group coaching sessions for about 90 – 120 minutes. Participants will be provided with homework assignments, topics of discussion, and tools to make progress towards their individual goals. The pod coaching will be facilitated by the coach.
- **Individual Coaching:** For various reasons, participants may be better suited for individual coaching, as opposed to the pod coaching. In lieu of the pod coaching, these participants will meet for one (1) hour one on one with the coach.
 - It is recommended that the individual coaching engagements include an additional three triad meetings with the person receiving coaching, their supervisor, and the coach. The purpose of these triad meetings is to ensure alignment on the goals and desired outcomes from the coaching engagement, discuss progress and identify ways the supervisor can support the employee in their ongoing professional development.

Tentative Schedule

- Group Training Session: First Wednesday of the month 9:00 a.m. - 11:00 a.m.
- Pod Coaching Sessions: Third Wednesday of the month 9:00 a.m. – 11:00 a.m.
- Individual Coaching Sessions: Third Wednesday of the month at 11:30 p.m., 1:00 p.m., and 2:30 p.m.

- Triad meetings: 2nd Wednesday of the month at 9 a.m., 10 a.m. and 11 a.m. (July, December and June)

Scheduling will be modified as needed based on the needs of the group and coach. However, a majority of participants will need to be absent to justify rescheduling a group coaching or pod session.

The group training sessions, pod coaching and individual coaching sessions are intended to be in person but may switch to virtual if agreed upon by coach and participants.

Month	Program Component	
May	Coach attends department head meeting (include those that will be participating in the program) to introduce self, discuss the program and the role of the department head team	TBD
	Participants take the assessments (ELI and EQI) and complete Client Intake form	
June	Conduct the "Get to Know You" sessions	TBD
July	1 st Group Training Session	7/3/2024
	1 st Triad meetings for 1:1 Coaching participants	7/10/2024
	1 st Pod Coaching and 1:1 Coaching Sessions	7/17/2024
August	2 nd Group Training Session	8/7/2024
	2 nd Pod Coaching and 1:1 Coaching Sessions	8/21/2024
September	3 rd Group Training Session	9/4/2024
	3 rd Pod Coaching and 1:1 Coaching Sessions	9/18/2024
October	4 th Group Training Session	10/2/2024
	4 th Pod Coaching and 1:1 Coaching Sessions	10/16/2024
November	5 th Group Training Session	11/6/2024
	5 th Pod Coaching and 1:1 Coaching Sessions	11/20/2024
December	6 th Group Training Session	12/4/2024
	2 nd Triad meetings for 1:1 Coaching participants	12/11/2024
	6 th Pod Coaching and 1:1 Coaching Sessions	12/18/2024
January (modified dates)	7 th Group Training Session	1/8/2025
	7 th Pod Coaching and 1:1 Coaching Sessions	1/15/2025
February (modified dates)	8 th Group Training Session	1/29/2025
	8 th Pod Coaching and 1:1 Coaching Sessions	2/19/2025
March	9 th Group Training Session	3/5/2025
	9 th Pod Coaching and 1:1 Coaching Sessions	3/19/2025
April	10 th Group Training Session	4/2/2025
	10 th Pod Coaching and 1:1 Coaching Sessions	4/16/2025
May	11 th Group Training Session	5/7/2025
	11 th Pod Coaching and 1:1 Coaching Sessions	5/21/2025
June (modified dates)	12 th Group Training Session	6/3/2025
	3 rd Triad meetings for 1:1 Coaching participants	6/11/2025
	12 th Pod Coaching and 1:1 Coaching Sessions	6/18/2025

Confidentiality and Reports

Confidentiality in a coaching engagement is critical for the client to make progress towards their goals. The terms and conditions of confidentiality will be discussed at the start of the engagement to ensure all parties (client, supervisor, and sponsor) have a common understanding of confidentiality. The coach may report to the supervisor and sponsor the number of sessions, the level of engagement of the client and whether the client is completing their assignments between sessions.

Program Cost

The total cost of the program for eight (8) participants in the monthly group sessions, one (1) coaching pod with five (5) participants, and three (3) individuals participating in the one-on-one coaching for 12-months is \$66,550.

Note: the Energy Leadership Index and EQI assessments are included in the costs below. The CliftonStrength finder will be purchased directly by the organization and is approximately \$60 per assessment. There is no cost for the Client In-take Form.

Invoice Schedule

Month	Invoice Amount
May	\$5,300
June	\$2,000
July	\$5,500
August	\$4,750
September	\$4,750
October	\$4,750
November	\$4,750
December	\$5,500
January	\$4,750
February	\$4,750
March	\$4,750
April	\$4,750
May	\$4,750
June	\$5,500
Total	\$66,550

Attachments

- A. Coaching Agreement (participants and sponsors)

SRSD Consulting, LLC Coaching Agreement with Sponsor

This agreement is between

Organization
(hereinafter "Sponsor")

and

SRSD Consulting, LLC
Sarah Schillerstrom
Chicago, IL 60660
(hereinafter "Coach")

Description: Coaching is a partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client in a thought-provoking and creative process that inspires the client to maximize personal and professional potential.

Sponsor: The Sponsor is responsible for payment of all services and may provide background information to the Coach.

Client: The Client is the person in direct receipt of the coaching services.

Responsibilities:

1. Coach agrees to maintain the ethics and standards of behavior set by the International Coach Federation "(ICF)".
2. Client is responsible for creating and implementing his/her own physical, mental and emotional well-being, decisions, choices, actions and results. As such, the Sponsor and Client agree that the Coach is not and will not be liable for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Sponsor and Client understand coaching is not therapy and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease.
3. Sponsor and Client understand that coaching is not to be used as a substitute for professional advice by legal, mental, medical, financial or other qualified professionals and will seek independent professional guidance for such matters. If the Client is under the care of a mental health professional it is advised for the Client to inform the mental health care provider of the nature of the agreed upon coaching relationship between Client and Coach.
4. Sponsor and Client understand that our work together as Certified Professional Coach-Client is centered on a professional coaching methodology that is designed to deepen awareness and facilitate Client's capacity to identify, develop and create unique personal, interpersonal, spiritual, professional and business development intention and goals; illuminate internal and external barriers, challenges, and blocks; develop practices and strategy to work with and

through challenges, and create plans and action that allows Client to move in alignment toward their self-defined meaningful outcomes.

5. Sponsor and Client understand that coaching is a comprehensive approach that may involve various aspects of life including work, finances, relationships, spiritual connection, health and wellness, recreation, and education. Client acknowledges that they are fully responsible for how they incorporate and implement coaching principles and insights into areas of their life.
6. Sponsor and Client understand that coaching does not involve any diagnoses or treatment of mental disorders as defined by the American Psychiatric Association and that coaching may be used in conjunction with but is not to be used as a substitute for counseling, psychotherapy, psychoanalysis, mental health care, or substance abuse treatment or other professional advice by legal, medical or other qualified professionals and Client remains fully responsible for availing myself of these services if they identify a need to do so.
7. Client agrees to communicate honestly, be open to feedback and assistance and create the time and energy to participate fully in the program.

Services: The coaching services covered in this agreement will be performed via Zoom/virtual video, as jointly agreed by Client and Coach. Coaching sessions will be 60-minutes long and will involve a structure that includes:

- Establishing the intention/goal of the session as set by the client.
- Integrating observations, awareness, outcomes from any actions taken from prior sessions.
- Coaching around the specific area the Client is working with.
- Check-ins as needed to identify how aligned the session is progressing toward clients' needs, goals, desire; acknowledging that initial intentions/goals often shift or get refined due to clarity and insights in a session and the coach will work with the client to optimize these shifts and insights.
- Closing the session with reflections and awareness of what insights the client developed, what steps/action the client would like to take in alignment with their insights, and what support/accountability they need to move these insights forward in a way that is most meaningful to the clients' unique desired outcome.
- Coach will be available to Client by e-mail and voicemail in between scheduled meetings as defined by the Coach.

"Coaching" is a structured yet adaptive and responsive approach that involves:

- Asking open-ended questions designed to provide space for the client to reflect and surface what is living for them currently, what underlying energy, thoughts, feelings are present in a given circumstance or situation and what impact are they having, and what alternative, expansive and/or simply different energy, thoughts, and feelings might be available to play and work with in relation to the client's unique outcomes and goals.
- Asking clarifying questions to better understand a situation, validating and championing

movement in alignment with client's goals, brainstorming, reflecting back observations (only with consent from the client to do so), and scaffolding processes for clients to develop actionable strategy and plans where desired.

- Providing a generative space for clients to access and develop their inner "higher coach" that is your guide. As a coach I do not "tell you what to do." I am direct and intentional and responsive to your specific needs and I work as a catalyst and guide to help you move with and develop your goals and outcomes in full alignment with your power and purpose in concrete and specific ways that are unique to you.

Schedule & Fees: The Sponsor is responsible for all payments in accordance with the agreed upon fee schedule.

Procedure: The time of the coaching meetings and/or location will be determined by Coach and Client based on a mutually agreed upon time. The Coach will provide virtual meeting details in advance of each session. Client is responsible for ensuring the internet connection is stable.

Confidentiality: This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship, is bound to confidentiality by the ICF Code of Ethics but is not considered a legally confidential relationship (like in Medicine or Law). The Coach agrees not to disclose any information pertaining to the Client without the Client's written consent. The Coach will not disclose the Client's name as a reference without the Client's consent. Confidential information does not include information that: (a) was in the Coach's possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client's industry; (c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client's confidential information; or (e) that the Coach is required by law to disclose.

A Client participating in group coaching is bound by the confidentiality of information shared during group sessions and shall not share any information regarding other group members.

Cancellation and Attendance Policy: The cancellation/rescheduling/lateness policy is strictly enforced. Client can cancel or reschedule at no charge with at least 24 hours' notice. Once inside the 24-hour window before the appointment, if Client needs to cancel/reschedule, the session will still be invoiced. If Client is late for the session, the session will still end on time. All Coaching sessions should occur where both Client and Coach are in a very quiet place, with no distractions.

Termination: Either the Sponsor or the Coach may terminate this agreement at any time.

Limited Liability: Except as expressly provided in this agreement, the Coach makes no guarantees or warranties, express or implied. In no event will the Coach be liable to the Client for consequential or special damages. Notwithstanding any damages that the Client may incur, the Coach's entire liability under this agreement, and the Client's exclusive remedy, will be limited to the amount paid by the Client to the Coach under this agreement for all services rendered up until the termination date.

This is the entire agreement of the parties and reflects a complete understanding of the parties with respect to the subject matter. This agreement supersedes all prior written and oral representations.

Please sign this Agreement prior to the first scheduled coaching meeting. Retain a copy for your records:

Sponsor Representative Name: Signature: Date:	Coach Sarah Schillerstrom Signature: Date:
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SRSD Consulting, LLC Client Acknowledgement and Disclosure

This agreement is between

Client Name
(hereinafter "Client")

and

SRSD Consulting, LLC
Sarah Schillerstrom
Chicago, IL 60660
(hereinafter "Coach")

Acknowledge: I hereby certify that I have read the Agreement between my Sponsor and Coach and acknowledge I understand the terms and conditions of the Agreement.

Client: **First name, Last name (Title)**

Signature: _____

Date: _____

Disclosure: I hereby certify that I do not suffer from any physical or mental disability that might affect my participation in the coaching process, and, if I have any substance abuse problem or mental illness, I have consulted with my physical and other health care professional and been advised that I may participate in the coaching process without risk. I agree that if there is any change in this representation, I will promptly advise the coach.

Client: **First name, Last name (Title)**

Signature: _____

Date: _____