



AGENDA
BOARD OF EDUCATION – MOKENA SCHOOL DISTRICT 159
FINANCE COMMITTEE MEETING
Mokena Elementary School
February 12, 2018
7:00 PM

- I. ROLL CALL**
- II. PLEDGE OF ALLEGIANCE**
- III. PUBLIC COMMUNICATION**
- IV. Approval of Previous Minutes** 2
- V. OLD BUSINESS**
 - A. Continued Discussion on Debt/Revenue Cycles 4
- VI. NEW BUSINESS**
 - A. Five (5) Year Capital Improvement Plan 30
 - B. McKinstry Engineers presentation 37
 - C. Fako Research 45
- VII. Items for March 12, 2018 meeting**
- VIII. CLOSED SESSION** - For Purposes of Collective Bargaining; not to return; Pursuant of 5 ILCS 120/2/(c)(2)
- IX. ADJOURNMENT**

MINUTES
MOKENA SCHOOL DISTRICT 159 FINANCE COMMITTEE
MOKENA ELEMENTARY SCHOOL
January 8, 2018

BOARD OF EDUCATION

	PRESENT	ABSENT
Dr. Victoria Albon	✓	
Mr. Eric Bush	✓	
Mrs. Karen Bussean		✓
Mr. Alex Fenske	✓	
Dr. Teri Shaw	✓	
Mrs. Bonnie Ushijima	✓	
Dr. Kathleen Wilkey	✓	
Mrs. Lisa Zielinski	✓	

BOE Members present: Jennifer Riedl, Michael Everett

STAFF present: Janet Walker, Rachel Aguirre, Mary Louise Knoerzer,

VISITORS present: Dr. Don White, Robert Lewis

PRESS: None

ROLL CALL /PLEDGE OF ALLEGIANCE

At 7:00pm Roll Call was taken; Chairman Bush led the committee and audience in the reciting of the Pledge of Allegiance.

III. COMMUNICATIONS

PUBLIC: None

IV. APPROVAL OF PREVIOUS MINUTES

Mr. Bush moved to approve December 11, 2017 minutes as presented. The committee was in favor of the presented minutes. Alex Fenske second the motion.

V. OLD BUSINESS

A. TRANSPORTATION

- The committee continued their discussion on transportation fees. The consensus of the committee was to recommend to the Board of Education a fee structure for the 2018-19 school year to include:
 - Greater than 1.5 miles from attendance center: Free
 - Less than 1.5 miles along a hazardous route: Free
 - Less than 1.5 miles from attendance center: \$375
 - Maximum Family expense: \$750

VI. NEW BUSINESS

A. PMA PRESENTATION

- Robert Lewis from PMA Securities. Inc. gave a presentation on the debt structure of the district. He presented three options regarding revenue opportunities and how the debt structure could be structured. A fourth option was to do nothing.
- Need 90 days to get a referendum on the ballot for the November 2018 election
- Conduct a survey in the community to get their views regarding future referendums

- Get estimates for survey companies

VII. ITEMS FOR FEBRUARY 12, 2018 MEETING

- Discuss the beginning of a 5-year Capital Improvement Plan
- Mechanical Engineering Firm doing a walkthrough of the buildings
 - Make a list of what each building needs
- Start with Life Safety Survey
- Talk with building principals to see what they need and quantify their needs

VIII. ADJOURNMENT

At 8:43pm Chairman Bush adjourned the Finance Committee January 8, 2018 meeting. Mrs. Zielinski second the motion; Committee adjourned all in favor.

Minutes Respectfully Submitted by
Janet Walker, Administrative Secretary

**SCHOOL DISTRICT NUMBER 159
WILL COUNTY, ILLINOIS
(MOKENA)**

**Capital Appreciation School Bonds, Series 2000
General Obligation Limited School Bonds, Series 2016A
General Obligation Refunding School Bonds, Series 2016B**

**ANNUAL FINANCIAL INFORMATION
FOR FISCAL YEAR ENDED JUNE 30, 2017
CUSIP: 968869**

CONTACT INFORMATION:

Name and Title: Teri Shaw, Chief School Business Official
Employer: Mokena School District Number 159
Address: 11244 Willowcrest Lane
City, State, Zip Code: Mokena, Illinois 60448
Telephone: 708-342-4917
E-mail: shawt@mokena159.org

The amount of the Base has been determined to be \$214,288.12 for levy year 2017, which is calculated from an original Base of \$186,375.00 as increased annually by CPI.

DEBT SERVICE EXTENSION BASE AVAILABILITY

LEVY YEAR	TOTAL DEBT SERVICE ON LIMITED BONDS	DEBT SERVICE EXTENSION BASE	UNUSED DEBT SERVICE EXTENSION BASE
2017	\$205,050.00	\$214,288.12	\$9,238.12
2018	207,800.00	214,288.12	6,488.12
2019	204,925.00	214,288.12	9,363.12
2020	206,400.00	214,288.12	7,888.12
2021	207,725.00	214,288.12	6,563.12
2022	203,975.00	214,288.12	10,313.12
2023	205,150.00	214,288.12	9,138.12
2024	205,500.00	214,288.12	8,788.12
2025	205,000.00	214,288.12	9,288.12
2026	204,300.00	214,288.12	9,988.12
2027	208,300.00	214,288.12	5,988.12
2028	207,000.00	214,288.12	7,288.12
2029	205,500.00	214,288.12	8,788.12
2030	203,800.00	214,288.12	10,488.12
2031	206,800.00	214,288.12	7,488.12
2032	204,500.00	214,288.12	9,788.12
2033	206,900.00	214,288.12	7,388.12
2034	204,000.00	214,288.12	10,288.12

FINANCIAL INFORMATION AND ECONOMIC CHARACTERISTICS OF THE DISTRICT

DIRECT GENERAL OBLIGATION BONDED DEBT (PRINCIPAL ONLY)*

CALENDAR YEAR	SERIES 2000 BONDS (DECEMBER 1)	SERIES 2016A BONDS (DECEMBER 1)	SERIES 2016B BONDS (DECEMBER 1)	TOTAL OUTSTANDING BONDS
2018	\$ 515,535	\$ 110,000		\$ 625,535
2019	480,570	115,000		595,570
2020		115,000	\$ 195,000	310,000
2021		120,000	200,000	320,000
2022		125,000	205,000	330,000
2023		125,000	210,000	335,000
2024		130,000	215,000	345,000
2025		135,000	225,000	360,000
2026		140,000 ⁽¹⁾	235,000 ⁽¹⁾	375,000
2027		145,000 ⁽¹⁾	245,000	390,000
2028		155,000	255,000 ⁽¹⁾	410,000
2029		160,000 ⁽¹⁾	265,000	425,000
2030		165,000 ⁽¹⁾	275,000 ⁽¹⁾	440,000
2031		170,000	285,000	455,000
2032		180,000 ⁽¹⁾	300,000 ⁽¹⁾	480,000
2033		185,000 ⁽¹⁾	310,000	495,000
2034		195,000 ⁽¹⁾	325,000 ⁽¹⁾	520,000
2035		200,000	335,000	535,000
TOTAL	\$966,106	\$2,670,000	\$4,080,000	\$7,746,106

⁽¹⁾ Mandatory sinking fund payment.

*Amounts are rounded.

DIRECT GENERAL OBLIGATION BONDED DEBT (PRINCIPAL AND INTEREST)

CALENDAR YEAR	DEBT SERVICE ON SERIES 2000 BONDS	DEBT SERVICE ON SERIES 2016A BONDS	DEBT SERVICE ON SERIES 2016B BONDS	TOTAL OUTSTANDING BONDS
2017	\$1,890,000	\$ 205,050	\$ 152,950	\$2,248,000
2018	1,890,000	207,800	152,950	2,250,750
2019		204,925	345,025	549,950
2020		206,400	344,100	550,500
2021		207,725	343,025	550,750
2022		203,975	341,800	545,775
2023		205,150	340,425	545,575
2024		205,500	342,700	548,200
2025		205,000	343,500	548,500
2026		204,300	343,900	548,200
2027		208,300	343,900	552,200
2028		207,000	343,500	550,500
2029		205,500	342,700	548,200
2030		203,800	341,500	545,300
2031		206,800	344,800	551,600
2032		204,500	342,600	547,100
2033		206,900	344,900	551,800
2034		204,000	341,700	545,700
TOTAL	\$3,780,000	\$3,702,625	\$5,795,975	\$13,278,600

OVERLAPPING GENERAL OBLIGATION BONDED DEBT
 (As of December 13, 2017)

TAXING BODY	OUTSTANDING DEBT ⁽¹⁾	APPLICABLE TO DISTRICT	
		PERCENT	AMOUNT
Will County Public Building Commission	\$ 0	2.999%	\$ 0
Will County Forest Preserve District	124,329,792	2.999%	3,728,673
New Lenox Township	910,544	1.337%	12,178
Village of Mokena	710,000	66.046%	468,925
Village of Orland Park	69,925,000	0.980%	685,519
Mokena Community Park District	5,740,000	60.736%	3,486,258
New Lenox Public Library District	1,885,000	1.483%	27,948
Community High School District Number 210	247,169,161	15.707%	38,822,548
Community College District No. 525	56,530,000	3.058%	1,728,880
TOTAL OVERLAPPING BONDED DEBT			\$48,960,929

Source: Will County Clerk's Office.
 (1) Does not include Alternate Revenue Bonds.

SELECTED FINANCIAL INFORMATION

2016 Estimated Full Value of Taxable Property:	\$1,662,460,479
2016 EAV of Taxable Property:	\$ 554,153,493
Population Estimate:	19,172
General Obligation Bonded Debt:	\$ 7,746,106
Other Direct General Obligation Debt:	\$ 329,006
Total Direct General Obligation Debt:	\$ 8,075,112
Percentage to Full Value of Taxable Property:	0.49%
Percentage to EAV:	1.46%
Debt Limit (6.9% of EAV):	\$ 38,236,591
Percentage of Debt Limit:	21.12%
Per Capita:	\$ 421.19
General Obligation Bonded Debt:	\$ 7,746,106
Overlapping General Obligation Bonded Debt:	\$ 48,960,929
General Obligation Bonded Debt and Overlapping General Obligation Bonded Debt:	\$ 56,707,034
Percentage to Full Value of Taxable Property:	3.41%
Percentage to EAV:	10.23%
Per Capita:	\$ 2,957.80

COMPOSITION OF EQUALIZED ASSESSED VALUATION

	2012	2013	2014	2015	2016
Residential	\$475,761,018	\$448,895,743	\$439,441,553	\$444,816,543	\$464,893,559
Farm	483,448	373,440	374,741	380,943	401,517
Commercial	70,281,295	68,612,325	69,581,073	68,739,540	70,080,145
Industrial	<u>18,499,502</u>	<u>18,615,437</u>	<u>18,431,367</u>	<u>18,266,155</u>	<u>18,277,586</u>
Total EAV	\$565,025,263	\$536,496,945	\$527,828,734	\$532,203,181	\$553,652,807

Source: Will County Clerk's Office

TREND OF EQUALIZED ASSESSED VALUATION

LEVY YEAR	EQUALIZED ASSESSED VALUATION	% CHANGE IN EAV FROM PREVIOUS YEAR
2012	565,025,263	(5.09%) ⁽¹⁾
2013	536,496,945	(5.05%)
2014	527,828,734	(1.62%)
2015	532,203,181	+0.83%
2016	553,652,807	+4.03%

Source: Will County Clerk's Office

⁽¹⁾ Based on the District's 2011 EAV of \$595,333,347.

TAXES EXTENDED AND COLLECTED

TAX LEVY YEAR/ COLLECTION YEAR	TAXES EXTENDED	TAXES COLLECTED AND DISTRIBUTED	PERCENT COLLECTED
2011/12	\$14,557,091	\$14,525,664	99.78%
2012/13	15,082,784	15,048,723	99.77%
2013/14	15,481,692	15,467,851	99.91%
2014/15	15,910,869	15,892,481	99.88%
2015/16	15,893,184	15,891,428	98.99%
2016/17 ⁽¹⁾	16,159,464	16,138,414	99.87%

Source: Will County Treasurer's and County Clerk's Offices.

(1) As of December 14, 2017.

SCHOOL DISTRICT TAX RATES BY PURPOSE 2012-2016

(Per \$100 Equalized Assessed Valuation)

PURPOSE	2012	2013	2014	2015	2016	MAXIMUM RATE
Educational	\$1.8345	\$1.9550	\$2.0379	\$2.0460	\$2.0726	3.5000
Operations and Maintenance	0.2091	0.2178	0.2202	0.2212	0.2177	0.5500
Transportation	0.0724	0.0559	0.0555	0.0574	0.0584	0.0000
IMRF	0.0381	0.0545	0.0569	0.0590	0.0219	0.0000
Working Cash	0.0108	0.0119	0.0121	0.0124	0.0122	0.0500
Tort Immunity	0.0091	0.0218	0.0256	0.0245	0.0241	0.0000
Special Education	0.0626	0.0772	0.0832	0.0847	0.0833	0.4000
Social Security/Medicare	0.0381	0.0545	0.0569	0.0590	0.0220	0.0000
Bond and Interest	<u>0.3947</u>	<u>0.4371</u>	<u>0.4661</u>	<u>0.4221</u>	<u>0.4065</u>	0.0000
Total	\$2.6694	\$2.8857	\$3.0144	\$2.9863	\$2.9187	

Source: Will County Clerk's Office

TEN LARGEST TAXPAYERS

TAXPAYER NAME	2016 EQUALIZED ASSESSED VALUE	PERCENT OF DISTRICT'S TOTAL EAV
Meijer Stores LP	\$ 4,273,962	0.77%
Pipe Fitters Training Fund	3,141,650	0.57%
Horton Group, Inc.	3,110,528	0.56%
River Oaks Properties, LLC	3,037,296	0.55%
JC Penney Properties, Inc.	2,116,743	0.38%
Chicago Pipeline Co.	1,881,243	0.34%
Life Storage LP	1,656,245	0.30%
Trean Mokena Promenade LLC	1,558,192	0.28%
Exxon Mobil Pipe Line Co.	1,297,600	0.23%
American Tech Publishers Inc.	<u>1,223,880</u>	<u>0.22%</u>
	<u>\$23,297,339</u>	<u>4.21%</u>

Source: Will County Clerk's Office

The above taxpayers represent 4.21% of the District's \$553,652,807 2016 EAV. Every effort has been made to seek out and report the largest taxpayers. However, many of the taxpayers listed may own multiple parcels and it is possible that some parcels and their valuations may not be included.

WORKING CASH FUND SUMMARY

FISCAL YEAR	END OF YEAR FUND BALANCE
2013	\$1,745,790
2014	1,810,561
2015	1,877,501
2016	2,171,797
2017	2,143,446

Source: Compiled from the District's Audited Financial Statements for Fiscal Years ending June 30, 2013-2017.

SHORT-TERM BORROWING

The District has not issued tax anticipation warrants or revenue anticipation notes during the last five years to meet its short-term current year cash flow requirements.

FUTURE DEBT

The District does not anticipate issuing debt within the first 6 months of 2018.

DEFAULT RECORD

The District has no record of default and has met its debt repayment obligations promptly.

RETIREMENT PLANS

TEACHERS' RETIREMENT SYSTEM OF THE STATE OF ILLINOIS

The District participates in the Teachers' Retirement System of the State of Illinois ("TRS"). TRS is a cost-sharing multiple-employer defined benefit pension plan that was created by the Illinois legislature for the benefit of Illinois public school teachers outside the City of Chicago.

See Note 4 to the Audited Financial Statements for the year ending June 30, 2017 for a more complete discussion.

ILLINOIS MUNICIPAL RETIREMENT FUND

The District also participates in the Illinois Municipal Retirement Fund (the "*IMRF*"). The IMRF is a defined-benefit, agent multiple employer pension plan that acts as a common investment and administrative agent for units of local government and school districts in Illinois. IMRF is established and administered under statutes adopted by the Illinois General Assembly. The Illinois Pension Code sets the benefit provisions of the IMRF, which can only be amended by the Illinois General Assembly.

See Note 4 to the Audited Financial Statements for the year ending June 30, 2017 for additional information on the IMRF's actuarial methods and assumptions.

**EXHIBIT A — COMBINED STATEMENT OF REVENUES, EXPENDITURES
 AND CHANGES IN FUND BALANCE, 2013-2017**

	GENERAL FUND ⁽¹⁾	SPECIAL REVENUE ⁽²⁾	DEBT SERVICE	CAPITAL PROJECTS ⁽³⁾	MEMORANDUM TOTAL
Beginning Balance, July 1, 2012	\$ 7,867,530	\$2,143,974	\$1,321,322	\$760,560	\$12,093,386
Revenues	17,783,097	1,668,877	2,287,457	556	21,739,987
Expenditures	16,434,945	1,408,631	2,158,427	1,250	20,003,253
Transfers	(17,940)	0	17,940	0	0
Other	0	0	0	0	0
Ending Balance June 30, 2013	\$ 9,197,742	\$2,404,220	\$1,468,292	\$759,866	\$13,830,120
Beginning Balance, July 1, 2013	\$ 9,197,742	\$2,404,220	\$1,468,292	\$759,866	\$13,830,120
Revenues	17,929,601	1,506,889	2,294,046	336	21,730,872
Expenditures	17,739,272	1,614,327	2,260,873	0	21,614,472
Transfers	(17,940)	0	17,940	0	0
Other	(21,118)	0	0	0	(21,118)
Ending Balance June 30, 2014	\$ 9,349,013	\$2,296,782	\$1,519,405	\$760,202	\$13,925,402
Beginning Balance, July 1, 2014	\$ 9,349,013	\$2,296,782	\$1,519,405	\$760,202	\$13,925,402
Revenues	18,864,632	1,322,113	2,408,542	2	22,595,289
Expenditures	19,274,674	1,512,489	2,398,991	0	23,186,154
Transfers	714,443	0	39,436	(753,879)	0
Other	153,095	0	0	0	153,095
Ending Balance June 30, 2015	\$ 9,806,509	\$2,106,406	\$1,568,392	\$ 6,325	\$13,487,632
Beginning Balance, July 1, 2015	\$ 9,806,509	\$2,106,406	\$1,568,392	\$ 6,325	\$13,487,632
Revenues	19,890,936	1,321,568	2,346,333	1,500	23,560,337
Expenditures	20,429,642	1,523,869	2,602,037	330,275	24,885,823
Transfers	(3,481,223)	0	0	3,481,223	0
Other	4,206,962	0	127,416	0	4,334,378
Ending Balance June 30, 2016	\$9,993,542	\$1,904,105	\$1,440,104	\$3,158,773	\$16,496,524
Beginning Balance, July 1, 2016	\$9,993,542	\$1,904,105	\$1,440,104	\$3,158,773	\$16,496,524
Revenues	22,136,596	1,146,022	2,218,005	5,240	25,505,863
Expenditures	21,273,636	1,372,569	2,260,377	3,207,699	28,114,281
Transfers	(107,110)	0	0	107,110	0
Other	0	0	0	0	0
Ending Balance June 30, 2017	\$10,749,392	\$1,677,558	\$1,397,732	\$63,424	\$13,888,106

Source: The audited financial statements of the District for the years ending June 30, 2013 - June 30, 2017.

- (1) Includes the Educational Fund, the Operations and Maintenance Fund, the Working Cash Fund and the Tort Fund.
- (2) Includes the Transportation Fund and the IMRF Fund.
- (3) Includes the Site and Construction Fund and the Fire Prevention and Safety Fund.

EXHIBIT B — BUDGET, FISCAL YEAR ENDING JUNE 30, 2018

	GENERAL FUND ⁽¹⁾	SPECIAL REVENUE ⁽²⁾	DEBT SERVICE	CAPITAL PROJECTS ⁽³⁾	WORKING CASH	TOTAL
FUND BALANCE AS OF 7/1/17	\$8,487,540	\$1,898,186	\$1,397,732	\$63,425	\$2,143,466	\$13,990,329
ESTIMATED REVENUE	16,567,925	1,276,286	2,253,599	0	74,046	20,171,856
ESTIMATED EXPENDITURES	16,326,235	1,538,541	2,264,587	0	0	20,129,363
OTHER/BOND PROCEEDS	0	0	0	0	0	0
ESTIMATED FUND BALANCE 6/30/18	\$8,729,230	\$1,635,931	\$1,386,744	\$63,425	\$2,217,492	\$14,032,822

Source: Budget for the District for the year ending June 30, 2018. Please note that the beginning fund balance represents an estimate by the District at the time the budget was produced. As such, the beginning fund balance may not match the ending fund balances for the year ended June 30, 2017, due to timing.

- (1) Includes the Educational Fund and the Operations and Maintenance Fund.
- (2) Includes the Transportation Fund, the Tort Fund and the IMRF Fund.
- (3) Includes the Site and Construction Fund and the Fire Prevention and Safety Fund.

**EXHIBIT C — GENERAL FUND REVENUE SOURCES,
 FISCAL YEARS ENDED JUNE 30, 2013-2017**

	YEAR ENDED JUNE 30, 2013	YEAR ENDED JUNE 30, 2014	YEAR ENDED JUNE 30, 2015	YEAR ENDED JUNE 30, 2016	YEAR ENDED JUNE 30, 2017
Local Sources	85.40%	84.76%	86.84%	84.96%	79.57%
State Sources:					
— General Aid	4.78%	4.59%	4.33%	2.98%	4.57%
— Supplementary General Aid	0.00%	0.00%	0.00%	0.00%	0.00%
— Mandated Categorical	5.14%	4.46%	3.39%	4.66%	3.33%
— Other State Sources	<u>0.39%</u>	<u>0.70%</u>	<u>0.09%</u>	<u>0.05%</u>	<u>12.58%</u>
Total State Sources	10.31%	9.75%	7.82%	7.69%	14.79%
Federal Sources	<u>4.29%</u>	<u>5.49%</u>	<u>5.34%</u>	<u>7.36%</u>	<u>5.65%</u>
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%

Source: The annual financial reports of the District for the years ending June 30, 2013-June 30, 2017. For purposes of this Exhibit, the General Fund includes the Educational Fund and the Operations and Maintenance Fund



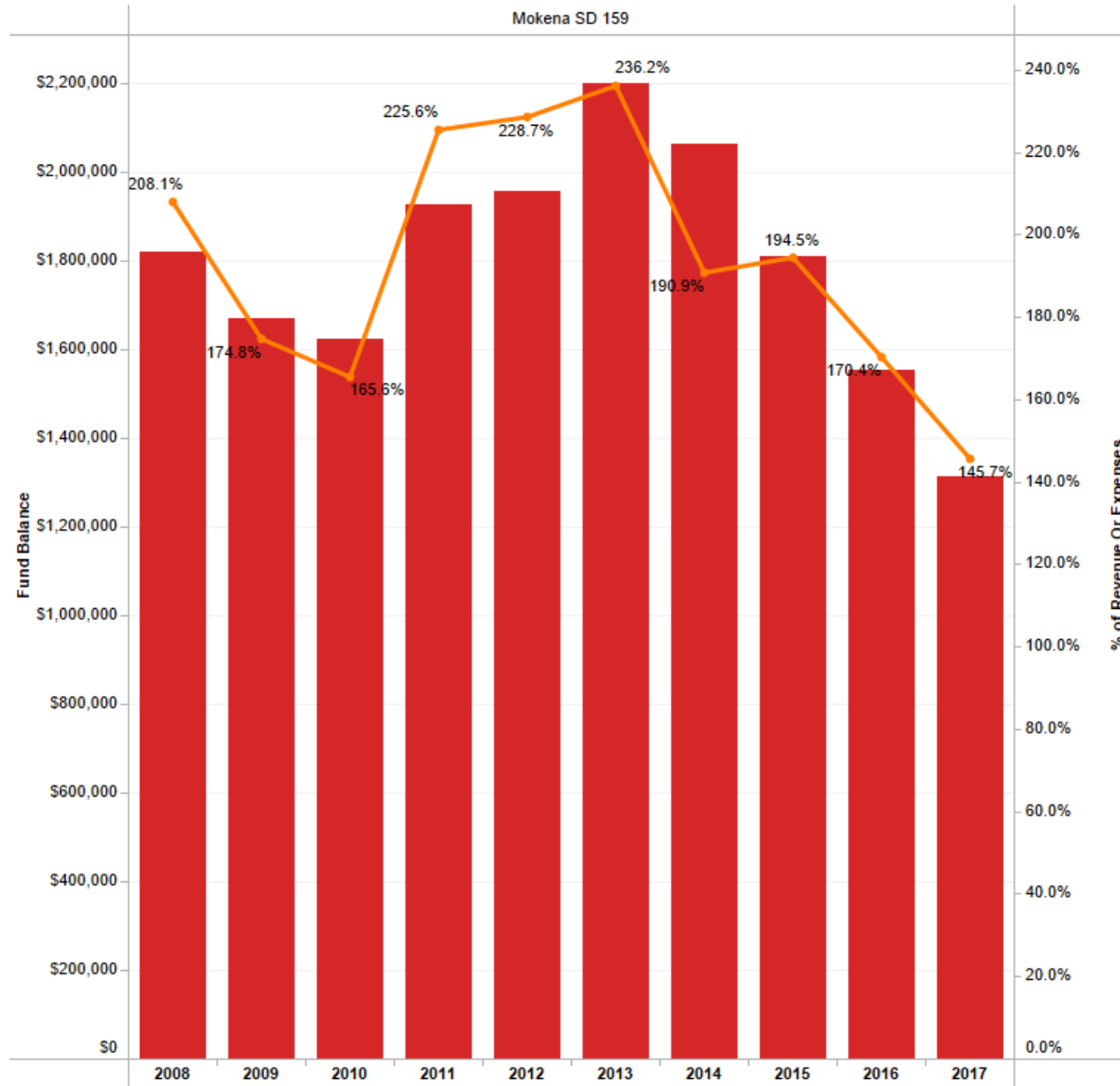
FORECAST⁵
ANALYTICS

Mokena SD – Transportation Analysis

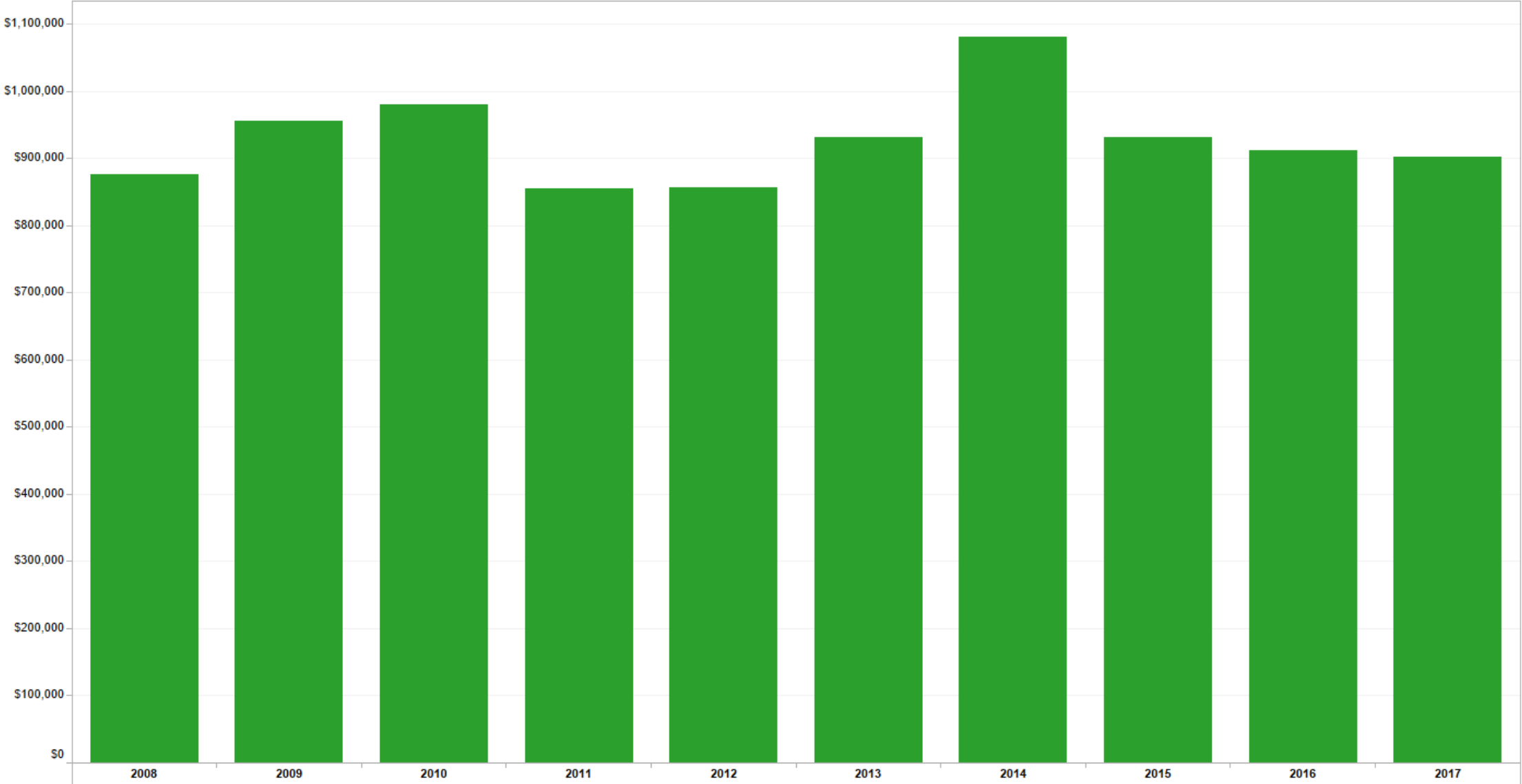
Transportation Review

Transportation Review	Fund Balance		Fees 1.5 miles or more	Fees 1.5miles or less
FY08	1,821,173			
FY09	1,670,164	(151,009)		
FY10	1,622,467	(47,697)		
FY11	1,926,814	304,347	200	375
FY12	1,957,732	30,918	200	375
FY13	2,200,137	242,405	200	375
FY14	2,061,971	(138,166)	200	200
FY15	1,810,696	(251,275)	150	150
FY16	1,554,081	(256,615)	100	100
FY17	1,313,827	(240,254)	100	100
FY18 - Est	1,382,359	68,532	200	375

Fund 40 Total Fund Balance Trend

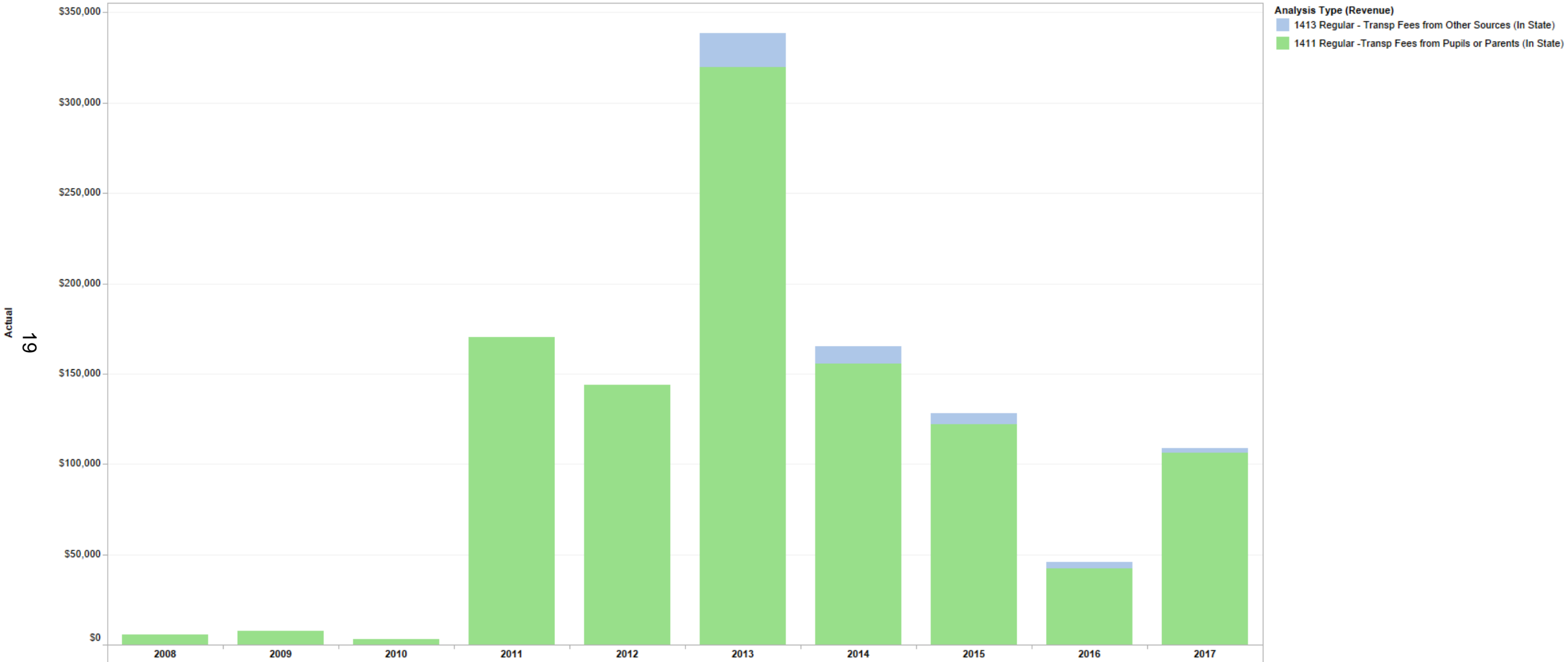


Fund 40 Total Expenses Trend

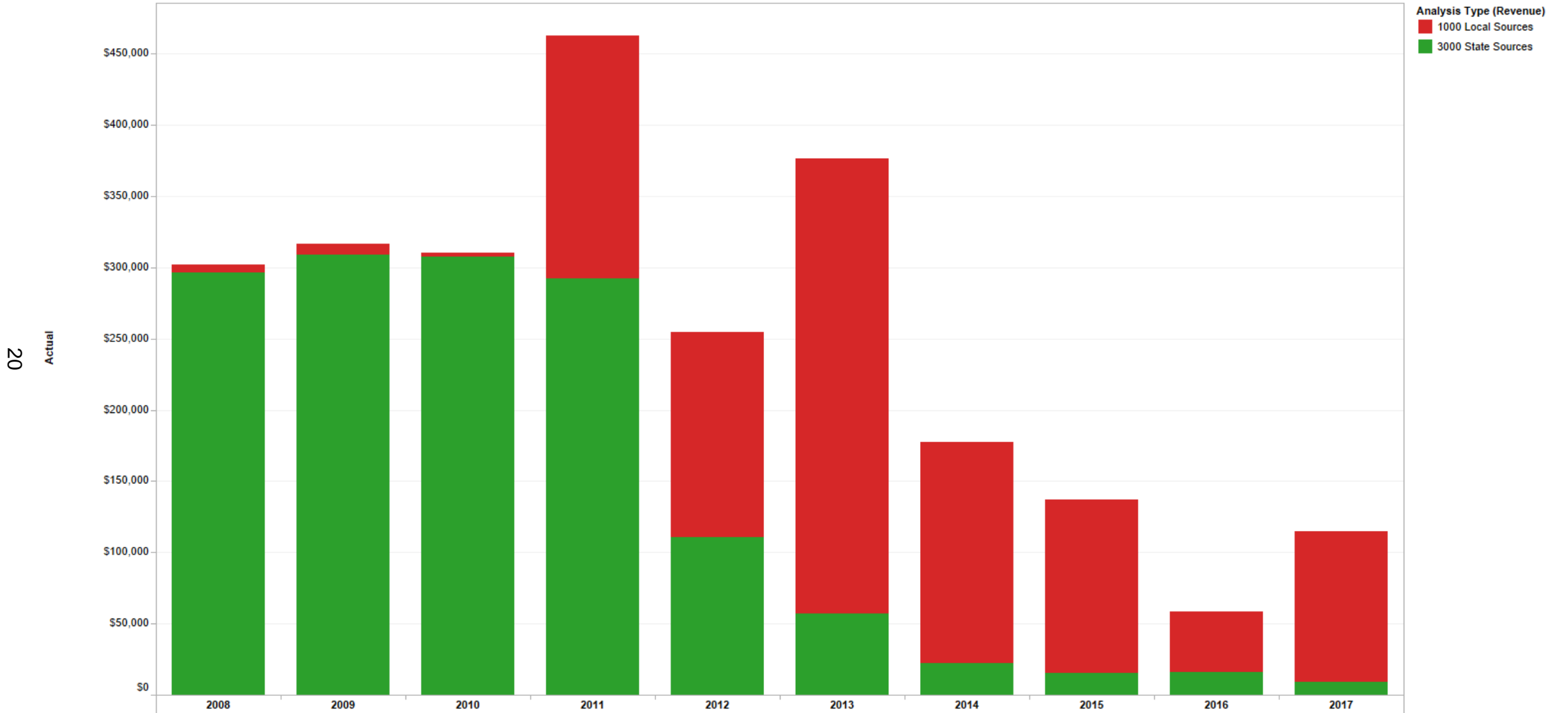


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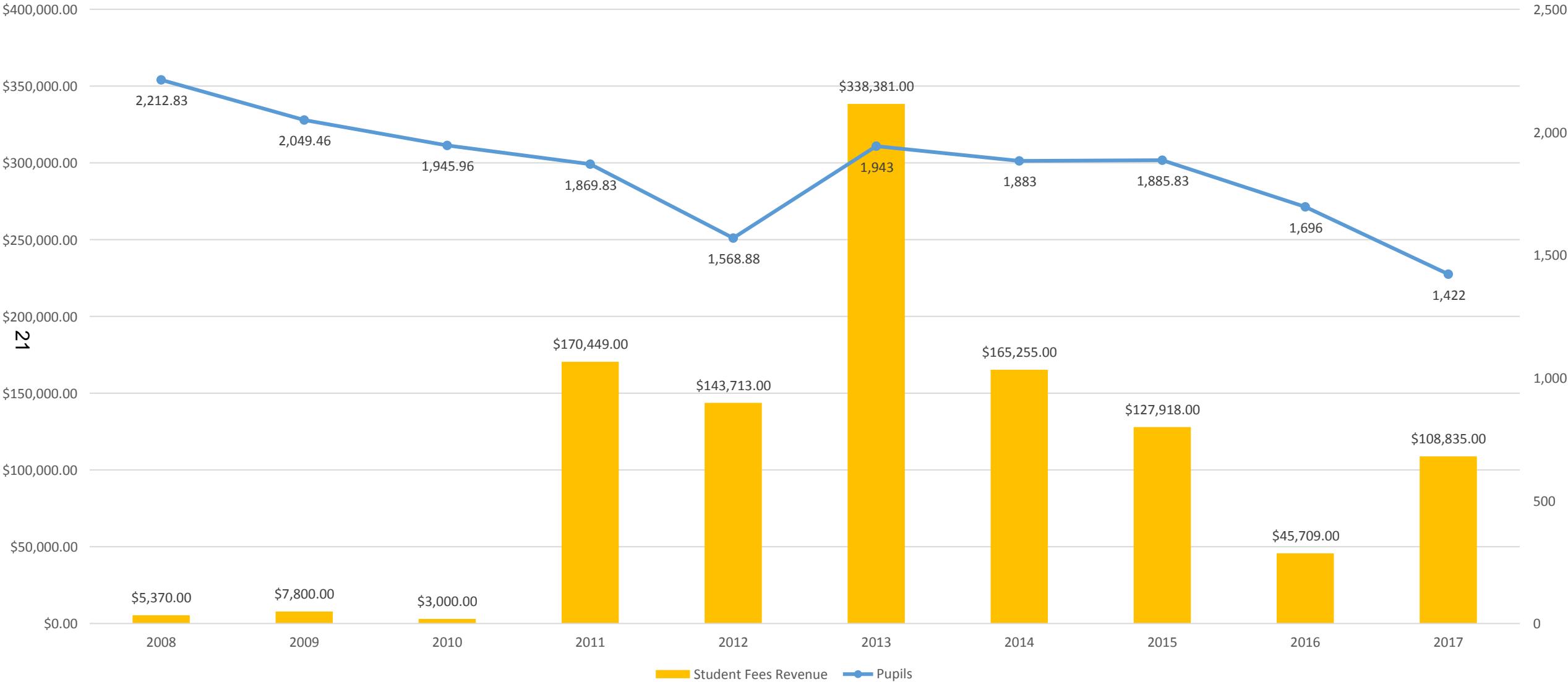
Fund 40 Total Revenue Trend For Student Fees



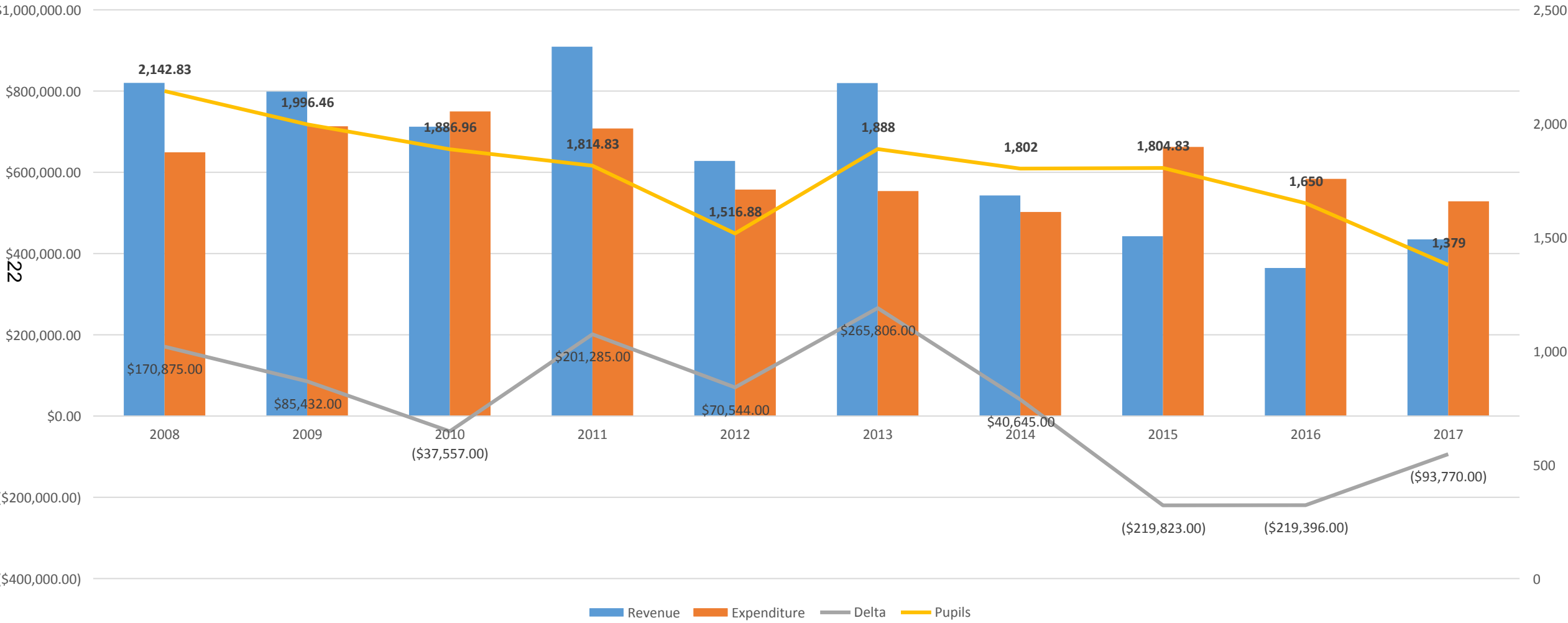
*Fund 40 Local Fees & State Reg. Trans. Reimbursement



Pupils Transported and Student Fees

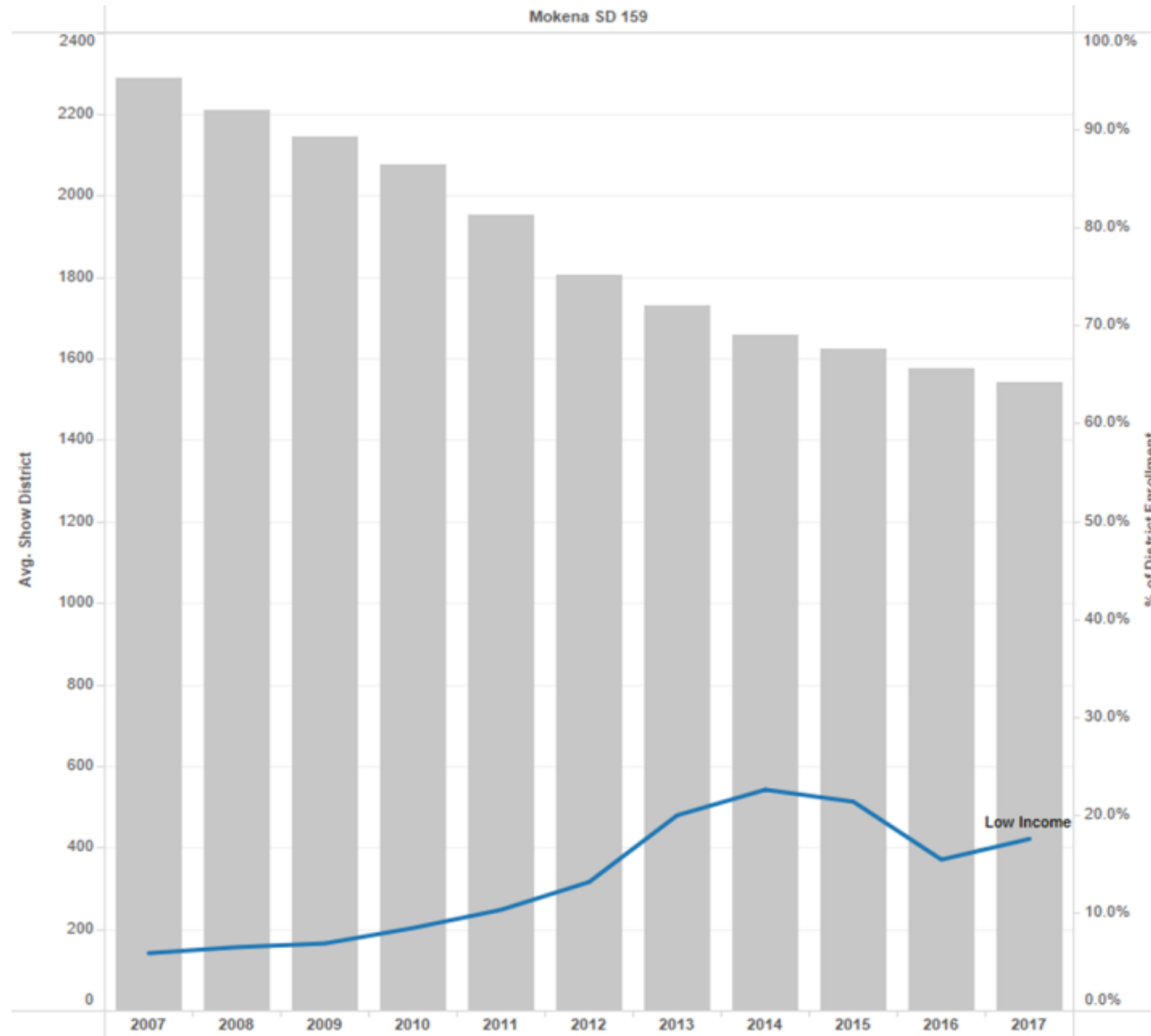


Regular Ed. Transportation Revenue and Expense, with Delta and Pupils Transported





Student Enrollment Trend

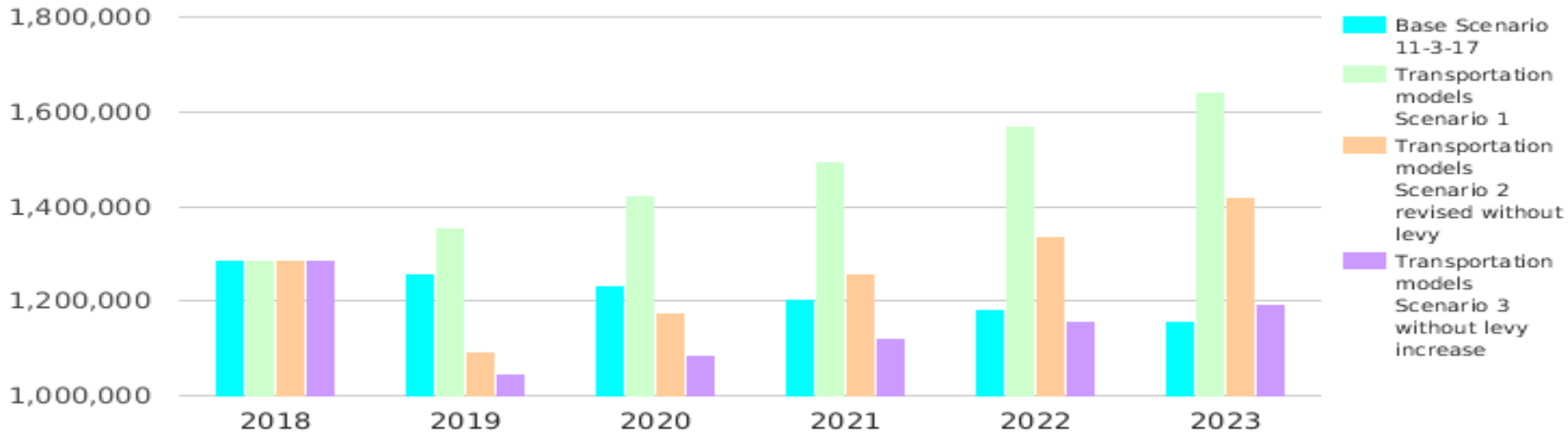


	FY2012-13	FY2013-14	FY2014-15	FY2015-16	FY2016-17	FY2017-18
	JT		RO		Transpo Team	
<1.5	33	38	33	403	389	64
HAZ.	23	29	23	42	41	188
>1.5	1080	1078	1073	720	695	663
TOTAL RIDERS	1136	1145	1129	1165	1125	915
Fees <1.5	375	200 and scale	150 and scale	100	100	375
FEES > 1.5	200	200 and scale	150 and scale	100	100	200
CAP		680	600	500	500	
REVENUE	\$ 319,496	\$ 155,467	\$ 121,854	\$ 42,415	\$ 106,235	\$ 147,968
<1.5	\$ 12,375	\$ 7,600	\$ 6,600	\$ 40,300	\$ 38,900	\$ 24,000
HAZ.	\$ 4,600	\$ 5,800	\$ 3,450	\$ 4,200	\$ 4,100	\$ 37,600
>1.5	\$ 216,000	\$ 215,600	\$ 160,950	\$ 72,000	\$ 69,500	\$ 132,600
Total Estimate	\$ 232,975	\$ 229,000	\$ 171,000	\$ 116,500	\$ 112,500	\$ 194,200



Comparison Report – fund balances

100K in Levy is removed 2019



- Base: Levy 2%; fees remain; state flat; sped flat**
- Scenario 1: Levy 100K plus 2%; fees remain; state flat; sped flat**
- Scenario 2: Levy 2%, fees for < 1.5, state reimbursement, sped flat**
- Scenario 3: Levy 2%; fees waived; state reimbursement; sped flat**

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Comparison Report – fund balances

Fund	2018	2019	2020	2021	2022	2023
Base	\$1,285,604	\$1,258,236	\$1,231,927	\$1,206,274	\$1,181,192	\$1,156,565
Scenario 1	\$1,285,604	\$1,354,155	\$1,424,286	\$1,495,955	\$1,569,115	\$1,643,685
Alt Scenario 2	\$1,285,604	\$1,093,290	\$1,175,556	\$1,257,320	\$1,338,494	\$1,418,956
Alt Scenario 3	\$1,285,604	\$1,048,290	\$1,085,556	\$1,122,320	\$1,158,494	\$1,193,956



Lincoln-Way Feeder Districts

Fee Type	D159	Summit Hill SD161	Frankfort SD157C	New Lenox SD122	Manhattan SD114	Union SD81	TROY SD33C	LOCKPORT SD91	WILL COUNTY SD92
HAZ <1.5	200.00	250.00	FREE	280.00	FREE		FREE		N/A
Transportation <1.5 mi.	375.00	250.00	522.00	280.00	375.00		N/A		N/A
Transportation >1.5 mi.	200.00	250.00	FREE	280.00	FREE		FREE		N/A
Family Cap				700.00					
N/A	SCHOOL DISTRICT DOES NOT PROVIDE TRANSPORTATION								

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Conclusions

- By adding 100K in levy for FY19 it will offset the loss of student fees for one year
 - Reconsider the levy allocation during levy process Oct/Nov 2018
- Transportation reimbursement will begin to flow in 2020
- Remove additional levy money from revenue when state reimbursement is received
- Transportation fund balance goal set at approximately 125% fund balance or \$1,250,00
- District may not need to charge fees to maintain fund balance
- Discontinue charging for students outside the 1.5 mile radius or within Hazardous route
- District has ability to charge for students less than 1.5 mile
 - Continue to charge \$375 for students within 1.5 mile radius
 - Approx 60 students
 - Cap family cost at \$750



10-Year Capital Project Plan

Note: 10-Year Safety Survey Report was used to create this schedule.

FY 19				
MES	Storage (under stairs)	Missing lamp at light socket	Provide missing lamp in open light socket	\$175
MES	LRC Mechanical Room	Missing occupant load sign	Provide occupant load signage	\$150
MIS	Room	Materials stored within 3-feet of electrical panels.	Remove stored materials within 3-feet of electrical panels.	\$150
MIS	Building	Stored material found within 18" of ceiling in sprinkler areas and within 24" in non-sprinkler areas.	Remove stored material in these areas.	\$1,200
MIS	Building	Broken or water-stained ceiling tiles	Replace ceiling tiles	TBD
			Total	\$1,675

FY 20				
MJH	Parking Lot	Parking lot needs repaving	Repave parking lot	TBD
MES	Main Entrance Door A	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$3,600
MIS	Main Entrance Door A	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$1,800
MIS	Door L	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900
MIS	Door K	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900
MES	Receiving 183	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$450
MES	Shipping 180	Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900
			Total	\$8,550

FY 21

MIS	Classrooms	Self-Closing Devices missing on door to egress corridor requiring 30-minute fire rating.	Provide missing door self-closing devices	\$25,500
MIS	Building	Hold open devices are prohibited on fire-rated doors including classrooms.	Remove all hold open devices	\$1,800
MIS	Corridors	Existing fire alarm pull stations abandoned in place next to new fire alarm pull stations.	Remove non-functioning fire alarm system equipment	\$1,800
MIS	Roof	Exterior double doors to fan room are deteriorating and do not close properly.	Repair or replace doors	TBD
Total				\$29,100

FY 22

MES	South	Self-closing devices missing on door to egress corridor requiring 30-minute fire rating.	Provide missing door self-closing devices	\$19,500
MES	Building	Self-closing devices missing on door to egress corridor requiring 30-minute fire rating.	Remove all hold open devices	\$2,400
Total				\$21,900

FY 23

MIS	Corridors Mechanical	Spacing of existing audio/visual notification devices appear inadequate	Spacing of existing audio/visual notification devices to determine if additional devices are required. Provide devices as required.	\$20,000
MES	Room Mechanical	Missing fire alarm audio-visual device	Provide audio-visual device	\$900
MIS	Room	Missing fire alarm device and audio/visual notification device.	Provide fire alarm detection device and audio/visual notification device.	\$1,800
Total				\$22,700

FY 24

FY 25	MES	South Classrooms	Several wood classroom doors are delaminating and not closing properly which could compromise the 30-minute fire rating.	Repair or replace wood classroom doors (half of the project).	\$18,400
	MES	South Classrooms	Several wood classroom doors are delaminating and not closing properly which could compromise the 30-minute fire rating.	Repair or replace wood classroom doors (Complete the project)	\$18,400
FY 26	MIS	Gymnasium	Frame and doors are not labeled to confirm 45m fire rating at three egress doors near northeast corner. Non-tempered glazing in middle of three egress doors near northeast corner.	Provide fire rated frame and door assembly.	\$12,350
	MIS	Gymnasium		Remove and replace glazing in fire rated door	\$450
				Total	\$12,800
FY 27	MIS	Gymnasium	Frame and doors are not labeled to confirm 45m fire rating at three egress doors near northwest corner.	Provide fire rated frame and door assembly.	\$12,350

FY 28

MES	CoGen Room	Deteriorating doors and hinges make it difficult to open, close, and latch properly.	Remove and replace existing steel frame and steel doors.	\$5,880
MES	CoGen Room	Large penetration through fire rated partition in west wall near southwest corner	Seal penetrations fire rated material	\$850
MIS	Corridors	Fire alarm pull stations and smoke detectors appear outdated and non operating.	Verify all fire alarm pull stations and detection devices are operating properly. Provide annual inspection report.	\$5,000
			Total	\$11,730

Note: Roofing assessment required at all three buildings and HVAC assessment required at MIS.

**TEN-YEAR SAFETY SURVEY REPORT
VIOLATION AND RECOMMENDATION SCHEDULE**

[\(23 IL Adm. Code 180, Sections 180.320\)](#)

ILLINOIS STATE BOARD OF EDUCATION
School Business and Support Services Division
100 North First Street
Springfield, Illinois 62777-0001
Telephone: 217/785-8779 Fax: 217/782-6096

For ISBE Use: ISBE review recommendations have been discussed with the A/E.	
Date	Reviewer Initials

1. COUNTY CODE 0197 - Will	2. DISTRICT CODE 1590 - MOKENA	3. SITE CODE	4. FACILITY CODE/NAME 2002 - Mokena Elementary School (MES) 1701 South Spencer Road, New Lenox IL 60451
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5. ITEM	6. LOCATION(S)		7. PRIORITY (A, B, C, D)	8. RULE VIOLATED	9. DESCRIPTION OF THE VIOLATION	10. RECOMMENDATION TO CORRECT VIOLATION	ESTIMATED COST OF CORRECTIONS	CORRECTIVE WORK PERFORMED BY:	
	ROOM NO	ROOM NAME						OWNER	10 YSS
1.	216	Mechanical Room	A		Missing fire alarm audio-visual device	Provide audio-visual device	\$900.00		
2.	Classrooms	Classrooms	B		Hold open devices (wedges, mechanical stops, etc.) are prohibited on fire-rated doors including all classrooms	Remove all hold open devices	\$2,400.00		
3.	Classrooms	MES South	B		Self-closing device(s) missing on door to egress corridor requiring 30-minute fire rating.	Provide missing door self-closing device(s).	\$19,550.00		
4.	027	CoGen Room	B		Large penetration through fire rated partition in west wall near southwest corner	Seal penetrations fire rated material	\$850.00		
5.	027	CoGen Room	B		Deteriorating doors and hinges make it difficult to open, close, and latch properly.	Remove and replace existing steel frame and steel doors.	\$5,880.00		
6.	Site	Receiving 183	C		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$450.00		
7.	Site	Shipping 180	C		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900.00		
8.	Site	Door A (Main Entrance)	C		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$3,600.00		
9.	101-123	MES South Classrooms	B		Several wood classroom doors are delaminating and not closing properly which could compromise the 30-minute fire rating	Repair or replace wood classroom doors	\$36,800.00		
10.	N105	Storage (under stairs)	B		Missing lamp at light socket	Provide missing lamp in open light socket	\$175.00		
11.	N254	LRC	B		Missing occupant load signage	Provide occupant load signage	\$150.00		
SUB-TOTAL:							\$71,655.00	\$0.00	\$0.00
CONTINGENCIES (10.0%):							\$7,165.50	\$0.00	\$0.00
A/E FEES (10.0%):							\$7,165.50	\$0.00	\$0.00
ESTIMATE OF PROBABLE COST:							\$85,986.00	\$0.00	\$0.00

**TEN-YEAR SAFETY SURVEY REPORT
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5 ITEM	6. LOCATION(S)		7. PRIORITY (A, B, C, D)	8. RULE VIOLATED	9. DESCRIPTION OF THE VIOLATION	10. RECOMMENDATION TO CORRECT VIOLATION	ESTIMATED COST OF CORRECTIONS	CORRECTIVE WORK PERFORMED BY:	
	ROOM NO	ROOM NAME						OWNER	10 YSS
1.	Various locations	All Classrooms, Music Room 101	B		Hold open devices (wedges, mechanical stops, etc.) are prohibited on fire-rated doors including all classrooms	Remove all hold open devices	\$1,800.00		
2.	Various locations	All Classrooms	B		Self-closing device(s) missing on door to egress corridor requiring 30-minute fire rating.	Provide missing door self-closing device(s).	\$25,500.00		
3.	Various locations	Corridors	B		Fire alarm pull stations and smoke detectors appear outdated and non operating	Verify all fire alarm pull stations and detection devices are operating properly. Provide annual inspection report.	\$5,000.00		
4.	Various locations	Corridors	B		Spacing of existing audio/visual notification (horn/strobe) devices appears inadequate	Verify spacing of existing audio/visual notification (horn/strobe) devices to determine if additional devices are required. Provide devices as required.	\$20,000.00		
5.	Various locations	Corridors	B		Existing fire alarm pull stations abandoned in-place next to new fire alarm pull stations.	Remove non-functioning fire alarm system equipment	\$1,800.00		
6.	Various locations	Classrooms and Storage Rooms	B		Stored material found within 18" of ceiling in sprinklered areas and within 24" in non-sprinklered areas	Remove stored material in these areas	\$1,200.00		
7.	016A	Mechanical Room	B		Missing fire alarm detection device (smoke) and audio/visual notification (horn/strobe) device	Provide fire alarm detection device (smoke) and audio/visual notification (horn/strobe) device	\$1,800.00		
8.	Exterior	Main Entrance (Door A)	B		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$1,800.00		
9.	Exterior	Main Entrance (Door L)	B		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900.00		
10.	Exterior	Main Entrance (Door K)	B		Concrete walk has multiple sections which have spalled or cracked creating a trip hazard	Remove and replace deteriorating concrete walk	\$900.00		
11.	018A	Receiving	B		Hold open devices (wedges, wire hangers, etc.) are prohibited on fire-rated doors	Remove hold open device.	\$150.00		
12.	019	Gymnasium	B		Non-tempered glazing in middle of three egress doors near the northeast corner	Remove and replace glazing in fire rated door	\$450.00		
13.	019	Gymnasium	B		Frame and doors are not labeled to confirm 45m fire rating at three egress doors near northwest corner	Provide fire rated frame and door assembly	\$12,350.00		

**TEN-YEAR SAFETY SURVEY REPORT
VIOLATION AND RECOMMENDATION SCHEDULE**

(23 IL Adm. Code 180, Sections 180.320)

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5 ITEM	6. LOCATION(S)		7. PRIORITY (A, B, C, D)	8. RULE VIOLATED	9. DESCRIPTION OF THE VIOLATION	10. RECOMMENDATION TO CORRECT VIOLATION	ESTIMATED COST OF CORRECTIONS	CORRECTIVE WORK PERFORMED BY:	
	ROOM NO	ROOM NAME						OWNER	10 YSS
14.	019	Gymnasium	B		Frame and doors are not labeled to confirm 45m fire rating at three egress doors near northeast corner	Provide fire rated frame and door assembly	\$12,350.00		
15.	142	Mechanical Room	B		Materials stored within 3-feet of electrical panels.	Remove stored materials within 3-feet of electrical panels.	\$150.00		
16.	Penthouse on roof	1972 Bldg		MAINTENANCE	Exterior double doors to fan room (East Side) are deteriorating and do not close properly	Repair or replace doors			
17.	Multiple Locations	Classrooms /Corridors		MAINTENANCE	Broken or water-stained ceiling tiles	Replace damaged ceiling tiles			
18.	Roof	1972 Bldg		MAINTENANCE	Roof at east half of 1972 building has begun to deteriorate.	Replace deteriorate roofing system			
19.	Roof	Chillers		MAINTENANCE	Chillers on the roof are showing reasonable age	District should consider a replacement plan.			
SUB-TOTAL:							\$86,150.00	\$0.00	\$0.00
CONTINGENCIES (10.0%):							\$8,615.00	\$0.00	\$0.00
A/E FEES (10.0%):							\$8,615.00	\$0.00	\$0.00
ESTIMATE OF PROBABLE COST:							\$103,380.00	\$0.00	\$0.00

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Mokena School District 159

Introduction to McKinstry and Facility Condition Assessment Process

February, 2018

Introduction to McKinstry

Nationally

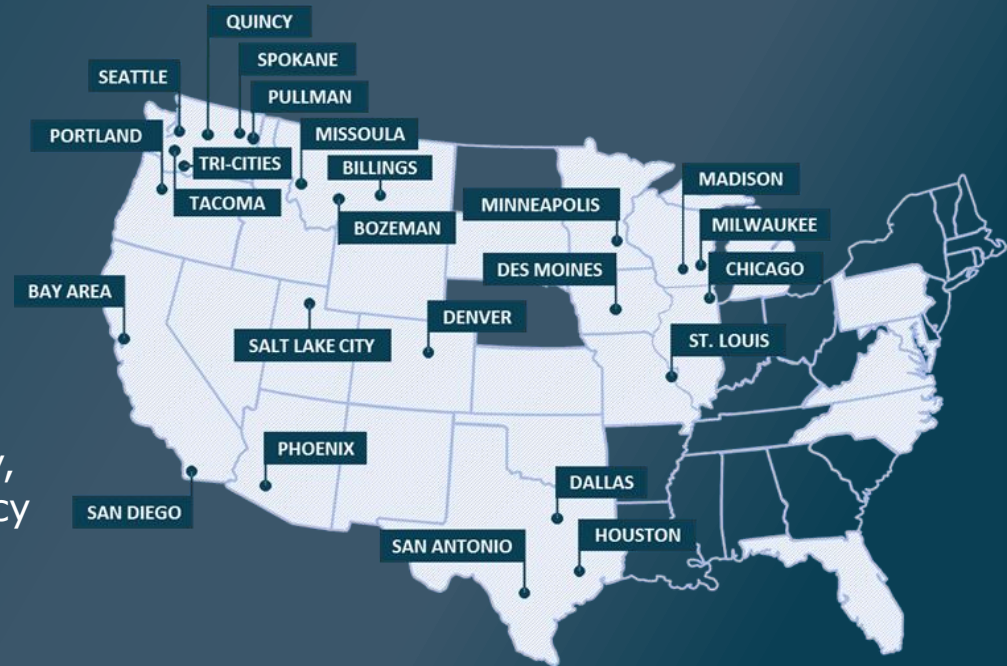
- One of the largest Energy & Facility Service companies in USA
- 3000 employees, 100+ engineers, 95 LEED® Accredited Professionals
- Achieved over \$200M of rebates, grants, donations

Locally

- Oak Brook, Madison, Minneapolis, Milwaukee, Des Moines, St. Louis
- 70+ employees
- Focus on public clients (K-12 schools, higher education, and municipalities)

McKinstry Difference

- Financial Approach, Vendor Neutrality, Transparent Delivery, Energy Efficiency Project Experience, Cost Effective



McKinstry Experience

- Libertyville School District 70 – 2 Phases
- Oshkosh Area School District – 9 Phases
- Richfield School District – 7 phases
- Hartford School District – 5 phases **(FCA)**
- St. Croix Falls School District **(FCA)**
- Green Bay School – 4 Phases
- Lake Geneva Schools – 2 Phases
- Riverdale School District – 3 Phases
- Fontana J8 School District
- Whitewater Unified School District – 2 Phases
- Genoa City J2 School District
- Marshall Public Schools
- Monona Grove School District – 4 Phases
- Northshore School District **(FCA)**
- Clinton Community School District
- Waterloo School District **(FCA)**
- Westby School District - 2 Phases **(FCA)**
- Muskego-Norway School District **(FCA)**



Lake Geneva Schools presented McKinstry's project team with an outstanding achievement award at their October board meeting to acknowledge our exceptional dedication to their facilities

The process



Learn



Audit



Analyze



Report

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Facility Condition Assessment (FCA)

- The FCA process continued
 - Living 5yr Capital Plan
 - District input and immediate needs
 - Multiple site visits w/ strategic partners
 - Facility Improvement Measure (FIM) Cost & Savings Analysis
 - Utility Data and Asset Analysis
 - 10-20yr expandable

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Example of Deliverable

Recommendation	Description	Budget	Notes
1. Additional Athletic Facility	Multi-use court space, weight room, locker room, office, storage	\$4,500,000-\$6,500,000	Presents opportunity to correct multiple issues at once
2. Environmental Systems Evaluation and Upgrade	Retro-commission all HVAC systems; Add air conditioning; Optimize existing systems	\$650,000-\$1,000,000	
3. Security System and Exterior Door Upgrade	Comprehensive door replacement and security upgrade	\$80,000-\$500,000	Budget ranges from security hardware upgrade only to 100% door replacement with comprehensive security installation
4. Roofing Replacement Plan	Roofing rehabilitation and replacement project (2018-2020)	\$855,000-\$1,100,000	17-year replacement life cycle; total replacement cost of \$4,000,000-\$5,100,000
5. Restroom Renovations/ Additions	Three new restrooms, one restroom expansion, renovate existing restrooms	\$1,250,000-\$1,750,000	This improvement measure can be scaled to need
6. Interior Door Lock & Handle Replacement	Replace all locks; bring selected door handles into ADA compliance	\$125,000-\$175,000	
7. Lighting Upgrade	Upgrade external and internal lighting to LED, optimize daytime sensors	\$350,000-\$475,000	
8. Window Upgrade	Upgrade to double pane, thermally improved windows	\$150,000-\$250,000	Budget estimates vary based on system/ material selection and possible casework/ mechanical impacts
9. External Wall Rehabilitation	Sealing seams and corners; external siding, finishes repaired; window repairs	\$90,000-\$125,000	
10. Track Re-Surfacing	Re-surface track	\$50,000-\$150,000	Budget estimates vary based on system/ material selection
Total Capital Project Cost Estimate		\$8,100,000 - \$12,025,000	

Next Steps

- Stay on track w/ timeline for Districts possible Borrowing
 - Rough Order of Magnitude
 - Complete ROM and FCA
 - Committee Presentation – March
 - Board Presentation – April
 - PreFinal
 - Board Presentation – May



Thank you for your time.

Kevin Korn

Sr. Account Executive

Kevinko@McKinstry.com | (815) 341-8384

Dan Choi

Midwest Business Development Director

Danch@McKinstry.com | (608) 630-4283

February 12, 2018

To: Mokena SD 159
From: Dave Fako, President & Senior Strategist
Re: Recommended Research Options

Thank you for requesting information about Fako Research & Strategies and for a proposal to conduct public opinion research for SD 159. The following is information on our firm, preliminary recommendations, and our proposal for research services.

Recommendations

Based on the information that was provided to us, the District's research objectives are to evaluate opinions of various possible policy initiatives and related topics of interest to the District.

FR&S recommends conducting a survey of approximately 10 – 15 minutes in length (~ 20 – 40 questions). This survey will be designed to assess opinions of the various issues of interest to the District regarding policies, funding and be utilized in the District' strategic planning.

We recommend targeting a sample size of n=300 for the survey. This is practical and reliable for the District.

The survey will screen for adult registered voters in the District, with a representative sample of the population, including parents and those without children in the District. We can narrow that down further if needed or desired.

We employ scientific sampling methods and very strict screening processes to ensure only qualified individuals participate in the survey. All polls are conducted in proportion to gender and regional shares of the population based on known demographics to ensure an accurate, representative sample.

Alternative Option:

As an alternative, FR&S suggests conducting the survey via a multi-mode (phone & online survey) as the mode of data collection. The phone and online iterations will be identical, with the data aggregated between both iterations. We also can differentiate the results by mode. The target sample size for the online segment is to be determined based on cooperation and participation, but is not capped at a specific number of completed surveys. SD 159 would be asked to promote the online portion of the survey via their internal networks and any public broadcast communications such as earned media, social media, school electronic and mailed newsletters, etc. It is likely that participation in the online segment will be skewed toward parents of students and others with a direct connection to the schools. Because online surveys are an opt in, non-probability sample, the results cannot be generalized to the population. Therefore, no Margin of Error (MoE) would be calculated, applied, or reported for the online segment of the survey. However, in our experience, if participation reaches or exceed levels that are practical for a phone survey, FR&S is confident that the composition of the sample with appropriate weighting adjustments would be a reasonable representative sample of the District's population.

Professional Fees for Polling Services

Fako Research & Strategies charges a professional fee "per poll." This professional fee includes the development of the questionnaire, acquisition and programming of the sample, data collection, including cell-phone interviews of at least 20%+ of the population (where possible), cross tabulation reports, analysis, and consultation throughout the effort. Authorized travel and miscellaneous out-of-pocket expenses are billed at cost. The following are our fees for polling projects with various specifications.

Type of Survey	Sample Size (n=)	Length of Interview	~ Goal Cell Phone % of Interviews ¹	Estimated Margin of Error (MoE)	Base Professional Fee
Community Public Opinion (Phone)	n=300	15 minutes (~35 – 40 Questions)	20% (n=60+)	+ / - 5.62%	\$19,850
Community Public Opinion (Phone)	n=300	12 minutes (~25 – 30 Questions)	20% (n=60+)	+ / - 5.62%	\$16,350
Community Public Opinion (Phone)	n=300	10 minutes (~20 – 25 Questions)	20% (n=60+)	+ / - 5.62%	\$14,850
Multi-Mode Community Public Opinion (Phone & Online)	Target n=300 Phone + Online (TBD)	15 minutes (~35 – 40 Questions)	20% (n=60+)	+ / - 5.62% (Phone Segment)	\$26,500
Multi-Mode Community Public Opinion (Phone & Online)	Target n=300 Phone + Online (TBD)	12 minutes (~25 – 30 Questions)	20% (n=60+)	+ / - 5.62% (Phone Segment)	\$22,250
Multi-Mode Community Public Opinion (Phone & Online)	Target n=300 Phone + Online (TBD)	10 minutes (~20 – 25 Questions)	20% (n=60+)	+ / - 5.62% (Phone Segment)	\$19,650

**The number of completed online surveys cannot be predicted, guaranteed or controlled by FR&S. Any paid promotion of the survey facilitated by FR&S shall be an additional fee quoted prior to conducting that service.*

Relevant Experience

FR&S has significant experience conducting public opinion surveys for units of government, school districts, and for public policy issues, ballot initiative and elections. Some recent relevant school district / government experience includes:

- **SD 21 (Wheeling)** – Our firm recently conducted a detailed assessment on a variety of topics in SD 21, which included mixed mode and conducting the survey in four different languages.
- **Glenview SD 34** – FR&S recently completed a similar multi-mode, multi-language survey for the District as part of their ongoing community engagement.
- **Village of Mundelein** – Fako Research conducted a survey of the residents of Mundelein focused on performance assessments of various Village responsibilities and Departments. This survey was conducted via mixed mode, both phone and online.

¹ FR&S's standard is to attempt to match the share (percentage) of completed interviews to the cell phone households' share of the sample acquired for the survey. FR&S will attempt to conduct 20% of all interviews via cell phone as long as the available sample supports that level of production. FR&S will not limit / cap the number of interviews conducted via cell phone at 20% and will complete more than 20% of all interviews via cell phone where practical.

- **Oak Park-River Forest HS** – FR&S conducted strategic research to assess opinions of various facility, programs, and the plans for a new swimming pool.
- **North Shore School District 112** – FR&S conducted a public opinion survey designed to assess opinions of their recently proposed building reconfiguration plan and a post referendum survey assessing the reasons for opposition and support and which options and opportunities have the best chance of success in a future initiative.
- **Village of Roselle** – The Village of Roselle utilized FR&S’s experience and expertise to design the survey instrument and process the data from an online survey that was administered by the Village’s internal data collection system.
- **Township HS SD 113** – FR&S conducted an extensive and very complicated communications audit survey using multi-mode online and phone data collection methods.

Two Decades of Commitment to Quality

Fako Research & Strategies (FR&S), founded in 1998 by Dave Fako, is a national public opinion research and strategic firm based in Chicago, Illinois. FR&S has always adapted to the changing research profession to maintain our high-quality standards. FR&S specializes in polling and strategic and organizational planning for political campaigns, public policy advocacy organizations, units of government, and private sector companies. We listen to our clients and work cooperatively with their strategic teams to develop focused and effective plans that fit our clients’ values, needs, and the unique dynamics of their situations.

High Quality Standards Provides Accuracy & Reliability

A hallmark of FR&S over the last two decades has been strictly implemented methodological techniques and standards that ensure quality, accurate, and reliable data used to develop successful strategic plans. With the changes in communication habits, data collection techniques, and legal restrictions on surveying, FR&S has continually adapted and improved our methods to maintain accuracy and reliability.

Adapting to Today’s Research Environment

The research profession has significantly changed over the last decade, with the emergence of cell phone only households, greater use of online surveys, and new communication techniques and habits. FR&S has been at the forefront of adapting to these changes. Fako Research was among the first firms to actively conduct interviews via cell phone (2002), began using online surveys as a data collection method in 2005, and we have continually adapted our sampling and screening techniques to ensure accuracy and reliability.

Research and Strategic Services

FR&S offers a wide array of research and strategic services to fit our clients’ needs. We offer our traditional quantitative research conducted via phone, while developing new options for our clients. We expanded the use of online surveys as a data collection technique, which provides our clients unique and economical research options and can be used for special projects such as online ad testing. FR&S also partners with respected qualitative researchers to provide in-depth information observed in focus groups. Our strategic and organizational planning services help any organization navigate challenges and capitalize on opportunities to achieve their objectives.

Affordable Research and Strategic Services

Recent changes and legal requirements have caused a significant change in research pricing structures. Fako Research & Strategies recognized that these changes were making quality research options unavailable to many clients. We adapted our fee structure to ensure our quality research and strategic services remain an option to all clients without sacrificing our standards. Simply stated, we are committed to keeping our quality research and strategic services economical and affordable.

For more information, please visit our website or contact us at:

www.fakoresearch.com

Dave Fako | President & Senior Strategist | 708-705-6791 | dfako@fakoresearch.com | Chicago, IL

Experience with School Districts, Units of Government, Education & Policy Issues

Fako Research & Strategies specializes in polling for local elections, units of government, and public policy organizations. Fako Research & Strategies has provided public opinion research and strategic advice on education issues and to pass tax and bond referendums for school districts and local governments throughout the country.

School Districts & Units of Government

Oak Park-River Forest HS
Glenview School District 34
Township HS Dist. 113
New Trier School District 203
Des Plaines School District 62
Orland School District 135
Glen Ellyn School District 89
North Shore SD 112
Wheeling SD 21
Cook County Department of Public Health
Roselle Park District
Pleasant Dale Park District
Village of Roselle
Illinois State Toll Highway Authority
Cook County Recorder of Deeds
Thornton Township, Illinois
South Suburban College

Referendums

Yes on Tax Increase Des Plaines School District 62
Yes on Bonds Orland School District 135
Progress Rock Island County (Courthouse Referendum)
Yes on Measure D-08 (Atascadero, CA)
No on Constitutional Convention (Con Con) for IFT (IL)
Yes on Senior Citizen Program Tax (Thornton Twp., IL)
Yes on Youth Program Tax (Thornton Twp., IL)
Yes on Bonds (Lemont School District 113a)
No on Longwall Mining (Montgomery Co., IL)
No on Health Dept. Consolidation (Springfield, IL)

Public Policy / Private Sector / Labor

Nextera Energy Resources
Illinois American Water
Rush University Medical Center
Loyola University Medical Center
University of Chicago Medical Center
Northwestern Memorial Hospital
Advocate Health Care
Amerigroup
U.S. Cellular
The Oneida Nation (New York)
Forest County Potawatomi Nation
Warner Gaming
COLT Mining
ComEd
Comcast
Humana
Clifford Law Offices
Respiratory Health Association of Chicago
American Lung Association
American Cancer Society of Illinois
American Cancer Society - Kansas City Metro
American Cancer Society - High Plains Division
American Heart Association
Public Health Institute of Metropolitan Chicago
Newton County Health Department (MO)
Adams County Health Department / ROPES Prevention (IL)
Campaign for Tobacco Free Kids
Tobacco Free Illinois Project

Public Policy / Private Sector / Labor

Illinois Coalition Against Tobacco (ICAT)
Smoke-free Chicago
Smoke-free Oak Park (IL)
Smoke-free Champaign (IL)
Smoke-free Urbana (IL)
Smoke-free Springfield (IL)
Smoke-free Peoria (IL)
Smoke-free Carbondale (IL)
Smoke-free Joliet (IL)
Smoke-free Quincy (IL)
Smoke-free Jefferson City (MO)
Smoke-free Joplin (MO)
Smoke-free Hannibal (MO)
Smoke-free Cape Girardeau (MO)
Smoke-free St. Charles (MO)
Clean Air Project Missouri
Illinois Unites for Marriage (Support Marriage Equality)
American Civil Liberties Union (ACLU)
Marsy's Law for Illinois
Connecting Rural America (CRA)
Friends of the Parks (Chicago)
Environmental Law and Policy Center
Chicago 2016 Committee
Liberty Prairie Foundation
Chicago Children's Museum
AFSME Council 31
American Federation of Teachers (AFT) – Wisconsin
American Federation of Teachers (AFT) Local 504
Chicago Federation of Labor (CFL)
Illinois Federation of Teachers (IFT)
Illinois AFL-CIO
UFCW Local 881
UFCW International
UNITE Here Local 1