



RFP Package

INTEGRATED, ELECTRONIC ENTERPRISE TMS

RFP ID: 370-600-20-004

PROPOSAL DUE DATE: March 13, 2020



TREASURER'S ORGANIZATIONAL CHART



Executive Staff

Treasurer

ILLINOIS STATE TREASURER

Michael W. Frerichs

**Treasurer's
Investment Board**

**Advisory
Committees**

Chief of Staff
G. Allen Mayer

**Chief Internal
Auditor**
Leighann Manning

**Treasurer's
Personnel Review
Board**



Executive Staff

Treasurer - Chief of Staff

Chief of Staff
Allen Mayer

**Director of
Scheduling**
*Chelsea
Lindeman*

**Chief Legislative
& Policy Officer**
*Catherine
Shannon*

**Chief Operating
Officer**

Aimee A. Pine

**Deputy
Treasurer
& Chief
Investment
Officer**

Rodrigo Garcia

**General Counsel
and Ethics
Officer**

*Chris Flynn
(acting)*

**Chief
Technology
Officer**

Karen Larson

**Chief
Communications
& Civic
Engagement
Officer**

*Paris Ervin
Doyle*

**Chief Financial
Products Officer**

Fernando Diaz

Senior Staff Exec Asst
Stephanie Goebel



Investments, Banking and Finance

Treasurer - Chief of Staff- Deputy Treasurer&Chief Investment Officer

Deputy Treasurer & Chief Investment Officer

Rodrigo Garcia

**Director of
Fiscal
Operations**
*Deborah
Miller*

**Director
Corporate
Engagement
& Invest Ops**
*Max
Dulberger*

**Director of
ePay and
IL Funds**
*Johanna
Perez*

**Senior
Advisor**
*Kara Highfill
Deborah
Graham*

**Director of
Portfolio &
Risk
Analytics**
*Angel
Herrera*

**Director
Investment
Analysis
Due
Diligence**
*Joseph
Aguilar*

**Director
State
Investme
nts &
Banking**
*Liz
Turner*

**Director
IPTIP
Investments**
*Jack
Weisenborn*

**Corporate
Responsibility
& Inv Ops
Project
Coordinator**
Rekha Vaitla

**Senior Credit
Risk Analyst**
*Rebecca
Fritchman
Shannon
Harris*

**Deputy
Director
Investment
Analysis
Due
Diligence**
*Jubril
Durojaiye*

**Deputy
Director
IPTIP
Investments**
*Brenton
Siemons*

**Sr.
Investment
Analyst**
vacant

**Investment Analyst
Diversity &
Investment**
Gerardo Martinez

**Sr. Staff
Executive Asst.**
Janira Clark

**Investment
Analyst**
vacant



Legal

Treasurer - Chief of Staff- General Counsel and Ethics Officer

GENERAL COUNSEL AND ETHICS OFFICER

Chris Flynn - Acting

Assistant General Counsel

*Jennifer Olaya
Joanna Coll
Barbara Delano
vacant*

Deputy General Counsel

*Laura Duque
Gwendolyn Drake*

Chief Procurement Officer

Maria Oldani

Executive Assistant

Renita Darnell

Legal Division Administrator

Chrystal Parsons

Deputy Chief Procurement Officer

vacant



Communications & Civic Engagement

Treasurer - Chief of Staff- Chief Communications & Civic Engagement Officer

CHIEF COMMUNICATIONS & CIVIC ENGAGEMENT OFFICER

Paris Ervin Doyle

Press Assistant
Rebecca Markley

Communications Specialist
Travis Collins

**Deputy
Communications
Officer**
Greg Rivara

Senior Advisor
Bryan Echols

**Manager
of Civic
Engagement**
*Sharon Howard -
Garchitorena*

Print Shop Manager
Matt Craig

Digital Director
Michael Sobczak



Legislative & Policy

Treasurer - Chief of Staff- Chief Legislative & Policy Officer

CHIEF LEGISLATIVE & POLICY OFFICER

Catherine Shannon

Senior Advisor
Vacant

**Deputy Director
of
Legislative Affairs**
*Sheleda Doss
Sara Meek*

Director of Policy
Laura Williams

**Program
Manager Invest in
Illinois AG Invest**
Rebecca Huston

**Director of
Financial
Education**
Nikki Giancola

**Director of
Charitable Trust**
Alex Armour

**Invest in Illinois
Program
Coordinator**
vacant



Information Technology

Treasurer - Chief of Staff- Chief Technology Officer

CHIEF TECHNOLOGY OFFICER

Karen Larson

**IT Security
Manager**
Joseph Daniels

**Sr. IT Manager - Security
and Infrastructure**
Jason Kates

Sr. IT Manager
Amy Edwards

Project Manager
Alan Duncan

**IT Client Support
Supervisor**
Austin Aleria

**Information Systems
Analyst II**
vacant

**Applications
Support Specialist**
John Hibbs

Business Analyst
Jeleta Robinson
(contractual)

Business Analyst
Jim Curran

**Network Support
Tech**
Donald Mehsling

Sr. Network Analyst
Dawid Pabian

IT Developer
Brian Irving
vacant

**SharePoint
Developer**
Cameron Yates
Laura Durbin
(contractors)

Contractor
Susan Kunz

Network Analyst
Gary Boston

Network Analyst
Gabriel Kandukuri
(contractor)

Sr. IT Developer
Thiri Aung

.Net Developer
Blake Denherder
(contractor)



Financial Products

Treasurer - Chief of Staff - Chief Financial Products Officer

CHIEF FINANCIAL PRODUCTS OFFICER

Fernando Diaz

Director of ABLE IL

J.J. Hanley

Senior Advisor

vacant

Deputy Director

College Savings

vacant

Director of Illinois Secure Choice

Courtney Eccles

Manager of ABLE

Rosemary Laudani

Manager of College

Savings

Marlyn Flores

Deputy Director Illinois Secure

Choice

Ashlee Gabrysch



Scheduling

Chief of Staff- Director of Scheduling

DIRECTOR OF SCHEDULING

Chelsea Gillogly

Assistant Director of Scheduling

*Blaise Bernardi
Emma Juby*

*Paul Faraci
Consultant
(contractual)*

Scheduling Coordinator

Connor Sloan



Internal Audit

Treasurer - Chief Internal Auditor

CHIEF INTERNAL AUDITOR

Leighann Manning

Senior Internal Auditor

Eric Williams

Internal Auditor

Alex Deal



Civic Engagement

Chief Communications & Civic Engagement Officer- Director of Civic Engagement

Director of Civic Engagement

Vacant

Manager of Civic Engagement

Sharon Howard-Garchitorena

Community Affairs Specialist

*Jeffery Drabe
Thomas Gary
Bonnie Jefferson
Paris McConnell
Alice Morales
Gladys Piper
Daniel Pogorzelski
Joan Riano-Chacon
LaVonte Stewart*

Marketing Representative

*Barb Chalko
Michelle Chavez
Joseph McNicholas
Andrew Heffernan*

Staff Assistant

Tim Coleman

Asst Mgr Civic Engagement

Blaise Bernardi

Community Affairs Specialist

*Lisa Badger
Dustin Morrison
Patrick O'Brien
vacant*



Operations

Treasurer - Chief of Staff- Chief Operating Officer

Chief Operating Officer

Aimee A. Pine

**Chicago Office
Manager**

*Veronica
Oganovich*

**Director of
Public Affairs**
David Clarkin

**Operations
Office Manager
UP**

*Melissa
Macomber*

**Facilities
Manager**
Tyler Hanners

**Director of
Unclaimed
Property
and
Compliance**
*Roxanna
Hollenstine*

**Office
Coordinator
Monroe
Building**
Rhonda Merritt

**Director of
Human
Resources**
VACANT

**Executive
Assistant**
Miguel Carlon

Storekeeper I
Brian Flinn

**Operations
Associate**
Danny Kern

**Executive
Assistant
Capitol
Reception**
Patricia Dawson

**Manager
Human
Resources**
Matt Kisling

**Human
Resources
Specialist**
Lana Peterson



Unclaimed Property

Treasurer - Chief of Staff- Chief Operating Officer - Director of Unclaimed Property & Compliance

DIRECTOR OF UNCLAIMED PROPERTY & COMPLIANCE

Roxanna Hollenstine

**ADVOCACY
DIRECTOR**
vacant

Staff Assistant
Jim Wozny

**Examinations
Audit Manager**
Ashton Kulavic

**Unclaimed
Property
Examiner**
*Springfield –
Otto Huber
Chicago – Jonathan
Talarico*

**Sr. Vault Security
& Ops Specialist**
Ronald Boerke

**Vault Security &
Ops Specialist**
*Melissa Carver
Megan Layendecker
Mike Paulauskis*

**Contractual
Employee**
Dan Keller

MANAGER FOR CLAIMS
Stephanie Ratliff

Office Associate

*Jeremy Biggers
Dennis Fisher
Juan Gonzalez
vacant
Kristi Neuman
Dave Powell
Vacant
vacant*

Office Coordinator
Jo Ellen Ackerman

Office Assistant
*Jennifer Cox
Scott Leavey
Tana Hupp*

Office Specialist

*Charlotte Brickler
Richard Carver
Jenifer Irving
Carolyn Koehler
Coty Lyons
Angel Pitts
Bailey Sands
Shawn White
Andrew Young*

**Office Admin
Specialist**
*Stephanie Ratliff
Lori Vassmer
Corey Prunty*

MANAGER FOR COMPLIANCE
Rick Cory

**Administrator of
Reporting &
Securities**
Jeff Wininger

Office Coordinator
*Pattie Beach
Carrie Benton
Lisa Livingston
Bev Sabo
Amanda Sturgis
vacant
vacant*

**MANAGER
OF VAULT
SECURITY**
Vacant

**MANAGER
OF
SECURITIES**
Brian Durr

**Sr. Securities
Specialist**
Chris Vespa



Fiscal Operations

Treasurer - Chief of Staff- Deputy Treasurer & Chief Investment Officer- Director of Fiscal Operations

DIRECTOR OF FISCAL OPERATIONS

Deborah Miller

Statewide Accounting Manager

April Woerner

Deputy Director Fiscal Operations

Wes Howerton

Budget Manager

Kyle Looby

Accountant II

*Mike Binegar
Stefanie Munos
Kathy West*

Accountant I

*Dana Bostwick
Allison Montney*

Agencywide Accounting Manager

Elizabeth Owens

Accountant II

Kathy Painter

Senior Accounting Specialist

Sandy Huffman

Accountant II

Tim Shipp

Financial Accountant

Jamie Usherwood

Accountant I

*Rebecca Hamilton
Kristi Schulte*

Senior Accounting Specialist

Juston Triplett



State Investments & Banking

Treasurer - Chief of Staff- Deputy Treasurer-Chief Investment Officer- Director of State Investments & Banking

DIRECTOR OF STATE INVESTMENTS & BANKING

Liz Turner

Deputy Director State Investments & Banking
vacant

**Portfolio Investments
Cash Management Officer**
vacant

Manager Investment Operations
Jennifer Goodrich

Manager Banking Operations
Justin Dietrich

Accountant II
Tawnya McCann

Accountant I
*Bob Walkup
Dave Lehman
Dawn Gwinn
Nelida Ramirez*

Senior Accountant
Ken Heuman

Accountant I (Treasury Operations)
*Linda Stuan
Debra Miller*

Accountant II (Treasury Operations)
April Womack



Illinois Funds & E-Pay Operations

Treasurer - Chief of Staff- Deputy Treasurer-Chief Investment Officer - Director of E-pay & Illinois Funds

DIRECTOR OF E-PAY & ILLINOIS FUNDS

Johanna Perez

Deputy Director E-Pay Illinois Funds

Andy Schacht

ePay IL Funds Project Manager

Leona Shannon

Illinois Funds Operations & Compliance Manager

Zach Sweet

ePAY Operations Manager

Denise McClung

ePay Relationship Manager

vacant

Participant Services Specialist

*Kristen Schone
Tierra Crumble
Bailey Koebler*

Participant Services Specialist

*Georgia Brahos
Jaleesa Davis*