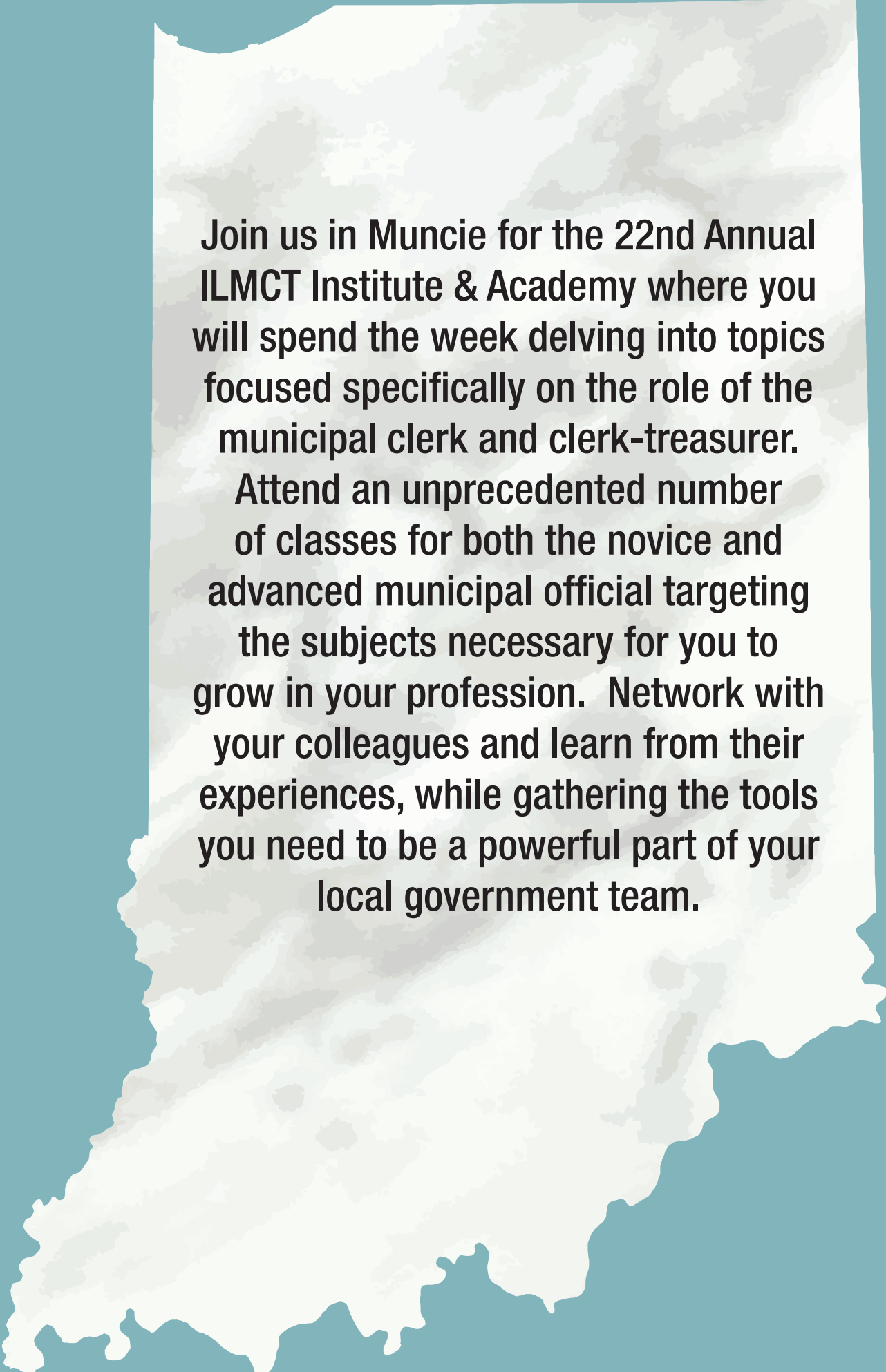




**22<sup>nd</sup> Annual ILMCT  
Institute & Academy**

**March 5 - 9, 2017  
Muncie, IN**



**Join us in Muncie for the 22nd Annual ILMCT Institute & Academy where you will spend the week delving into topics focused specifically on the role of the municipal clerk and clerk-treasurer.**

**Attend an unprecedented number of classes for both the novice and advanced municipal official targeting the subjects necessary for you to grow in your profession. Network with your colleagues and learn from their experiences, while gathering the tools you need to be a powerful part of your local government team.**

## What is the difference between the Institute & Academy?

**Certified Municipal Clerk (CMC)/Institute** – The CMC program is designed to enhance the job performance of the clerk, clerk-treasurer, controller and deputy clerk. To earn the CMC designation, attendance in an extensive education program is required. Institute classes are designed to equip attendees with the basic skills needed to carry out the duties of their office, based on the International Institute of Municipal Clerks (IIMC) core curriculum. These classes are also designed for those pursuing their Indiana Accredited Municipal Clerk (IAMC) designation through ILMCT.

**Master Municipal Clerk (MMC)/Academy** – The MMC program is an advanced continuing education program that prepares participants to perform complex municipal duties. The program has an extensive and rigorous educational component and a professional and social contribution component. The MMC applicant must demonstrate that they have actively pursued education and professional activities. Academy classes are deemed appropriate for those working towards their MMC designation. More information on the IIMC programs can be found at [www.iimc.com](http://www.iimc.com).

Additionally, both Institute and Academy classes can be used toward the Certified Public Finance Administrator (CPFA) designation offered through the Association of Public Treasurers of the United States and Canada. More information can be found at [www.aptusc.org](http://www.aptusc.org).

## Agenda

Sunday, March 5			
3:00 p.m. – 4:00 p.m.	Registration	2:20 p.m. – 4:10 p.m.	Institute & Academy Class – Internal Controls: An Overview, Best Practices and Lessons Learned
4:00 p.m. – 5:00 p.m.	Institute & Academy Class – Consolidation of LOITs into One Local Income Tax	6:00 p.m. – 9:00 p.m.	Dinner Class – Sound Banking Practices and Requirements <i>Sponsored by London Witte Group LLC</i>
5:10 p.m. – 7:00 p.m.	Institute & Academy Class – Understanding Grassroots Legislative Advocacy and Real-time Updates from the 2017 Legislative Session	Wednesday, March 8	
7:30 p.m.	Pizza at Courtyard	7:30 a.m. – 8:00 a.m.	Registration & Continental Breakfast
Monday, March 6		8:10 a.m. – 10:00 a.m.	Institute & Academy Class – Disaster Response Accounting: Setting Your Community Up Now for Reimbursement When the Time Comes
7:30 a.m. – 8:00 a.m.	Registration & Continental Breakfast	10:15 a.m. – 12:05 p.m.	Institute Class – Public Bidding - Start to Finish Academy Class – Unlocking the Confusion Around Capital Assets Accounting
8:00 a.m. – 12:00 p.m.	Institute Class – Dissecting Payroll and Related HR Matters Academy Class – Taking Budgeting to the Next Level	12:05 p.m. – 1:15 p.m.	Luncheon
12:00 p.m. – 1:00 p.m.	Luncheon	1:15 p.m. – 2:15 p.m.	Institute & Academy Class – Cybersecurity – Is Your Community Protected?
1:15 p.m. – 2:05 p.m.	Institute Class – Accounting Practices & Resources for Fiscal Officers Academy Class – The Whole Package: Grants from A to Z	2:30 p.m. – 4:20 p.m.	Institute Class – Feeling Confident with Your Presentation Skills Academy Class – Advanced Project Management Skills and Resources
2:20 p.m. – 4:10 p.m.	Institute & Academy Class – Making the Most of Workplace Conflict	4:20 p.m.	Wednesday Night Optional Activity – Tonne Winery <i>Not Included in Registration Fee</i>
6:00 p.m. – 9:00 p.m.	Monday Night Optional Activity – Scotty's Brewhouse <i>Not Included in Registration Fee</i>	Thursday, March 9	
Tuesday, March 7		7:30 a.m. – 8:00 a.m.	Registration & Continental Breakfast
7:30 a.m. – 8:00 a.m.	Registration & Continental Breakfast	8:10 a.m. – 10:00 a.m.	Institute Class – Professionalize Your Written Communications Academy Class – The Specifics of Selling and Buying Municipal Property
8:00 a.m. – 12:00 p.m.	Institute Class – Now, Therefore, Be it Resolved That You Need to Know About Municipal Resolutions, Ordinances and Codifications Academy Class – What You Need to Know About Personnel Responsibilities	10:15 a.m. – 12:05 p.m.	Institute Class – When, Where and How: Taxes and your Municipality Academy Class – Ethical Leadership for Clerks and Clerk-Treasurers
12:00 p.m. – 1:00 p.m.	Luncheon	12:15 p.m. – 1:30 p.m.	Luncheon & Closing Program
1:15 p.m. – 2:05 p.m.	Institute Class – Making Friends with Gateway Academy Class – TIF Establishment, Uses and Reporting Requirements		

# Educational Sessions

## Sunday, March 5

### **Consolidation of LOITs into One Local Income Tax (CMC, MMC)**

In an effort to simplify Indiana's income tax system, the General Assembly restructured three LOITs (CAGIT, COIT and CEDIT) in 2015. HEA 1485 merged these taxes into a single local income tax. The LIT, as it's now known, has three rate components. Municipal budget leaders need to know about this significant transition that goes into effect later this year. Attend this workshop to understand these impending changes to this vital municipal funding source.

### **Institute & Academy Class – Understanding Grassroots Legislative Advocacy and Real-time Updates from the 2017 Legislative Session (CMC, MMC)**

The Aim legislative team will walk participants through the importance, mechanics and strategies of grassroots lobbying. All elected and appointed fiscal officers should know how and when to engage with lawmakers, both while in session and out. The workshop will close with a detailed briefing on municipal-related bills under consideration at the statehouse and what, if any, actions by ILMCT members are advised.

## Monday, March 6

### **Dissecting Payroll and Related HR Matters (CMC)**

Much hinges on getting your payroll done on-time and without error. Do you pay enough attention to the details when it comes to paying your employees? Are you calculating time, withholdings, and benefits accurately and in keeping with all recent regulatory and legal changes? What human resources issues do you need to consider in regards to payroll, overtime, and more? If you can't answer these questions with 100% confidence, you need this class!

### **Taking Budgeting to the Next Level (MMC)**

Good budgeting requires more than just proper use of funds, compliance with a budget calendar and accurate completion of all appropriate forms. Once you've mastered the fundamentals, you're ready for the next level of budgeting. It's time to learn some strategic and data driven approaches to reaching your goals. Participants in this course will work through a municipal budget and get specific instruction on how to use the budgeting process as a tool for advancing your community.

### **Accounting Practices & Resources for Fiscal Officers (CMC)**

Public service attracts individuals from all walks of life. Not all municipal fiscal officers possess a deep background in accounting. If you've found yourself in this position or if you think you need a refresher on the basics, attend this workshop. Participants will receive introductory accounting instruction, helpful tips and refreshers, and accounting resources to reference throughout the year as issues arise.

### **The Whole Package: Grants from A to Z (MMC)**

Solid grant application writing is an indispensable skill, but there is far more to grants than writing well or even obtaining the funds you seek. Once a grant is awarded there are crucial, and sometimes cumbersome, reporting and administrative requirements to consider. Understanding the process from beginning to end will help you be a better advocate for the community when acquiring and administering grants.

### **Making the Most of Workplace Conflict (CMC, MMC)**

Everyone experiences conflicts in the workplace, even in the most friendly and productive environments. However, it is our initial reactions and long-term handling of conflicts that can promote successful outcomes from conflict. This interactive session will introduce participants to the types of conflict that occur in the workplace and provide tools and techniques for managing conflict toward positive outcomes. We will study and discuss several case-study scenarios and also gain experience through role-play. Participants will leave this workshop no longer fearful or intimidated by conflict, but confident in how best to successfully manage conflict to the benefit of their municipalities.

## Tuesday, March 7

### **Now, Therefore, Be it Resolved That You Need to Know About Municipal Resolutions, Ordinances and Codifications (CMC)**

Are you communicating your municipality's official rules and pronouncements effectively and in accordance with relevant legal guidelines? Do you know how to keep your books clear and clutter-free using appropriate codification techniques? As you likely know, the nuances between ordinances and codifications, and the procedures for their proper codification, are subtle but important. Attendees will leave this workshop with a strong appreciation for the technicalities of resolutions and ordinances.

### **What You Need to Know About Personnel Responsibilities (MMC)**

Comprehensive job descriptions, an updated and complete personnel manual, and a tested personnel evaluation program can save fiscal officers who wear many hats a great deal of time and frustration. They can also save a municipality a lot of money. This workshop will detail the components of a solid personnel management program and flag specific stumbling blocks to avoid. Attendees will also learn about some impactful personnel policies like uniforms, municipally funded mobile phones, and more.

### **Making Friends with Gateway (CMC)**

Indiana's mandatory budget and transparency portal has been in place since 2010. With the use of Gateway being expanded each year, understanding how to use the portal expertly and how to help your constituents access Gateway's database will pay off in time-savings and peace of mind.

### **TIF Establishment, Uses and Reporting Requirements (MMC)**

TIF is a vital tool for communities looking to make improvements to attract employers and workers alike. Along with the benefits of TIF comes the responsibility to accurately report information about TIF districts. Several longstanding reports, as well as the detailed reports enacted in HEA 1290-2016, will be covered in this workshop designed for municipal fiscal officers.

### **Internal Controls: An Overview, Best Practices and Lessons Learned (CMC, MMC)**

Over the past two years, following a strong state mandate, much time and intensity has been expended ensuring municipal officials and those who handle public funds exercise good judgement and sound practices to avoid mismanagement and fraud. It's time for a refresher course and a review of what's working, what's not, and how municipal fiscal officers can improve fiscal procedures in their communities.



### **Dinner Class – Sound Banking Practices and Requirements (CMC, MMC)**

This after dinner conversation will review the requirements placed upon local governments in obtaining banking services and investing funds. Discussion topics will include the role of your local Board of Finance, the Indiana Public Deposit Insurance Fund and best practices in cash management and investing.

### **Wednesday, March 8**

#### **Disaster Response Accounting: Setting Your Community Up Now for Reimbursement When the Time Comes (CMC, MMC)**

Getting hit with a significant natural disaster can be life-changing for the residents and businesses of any city or town, as well as for its municipal government. Getting hit a second time when expected FEMA reimbursement funds don't arrive is an even more devastating repeat blow. All fiscal officers should prepare now and understand what accounting and procedural practices must be used to ensure proper reimbursement of funds. The aftermath of a disaster, when resources are tight and stakes are high, is no time to get up to speed!

#### **Public Bidding - Start to Finish (CMC)**

State law codifies extensive procedures regarding how and when to conduct public bidding and make selections on publicly bid projects. Are you following the law? If not, your community is exposed to significant liability. Fiscal officers will leave this workshop understanding the public bidding process from start to finish.

#### **Unlocking the Confusion around Capital Assets Accounting (MMC)**

Capital assets for local governments are different from what are typically described as fixed assets in the private sector. Are you aware of how to identify a capital asset and account for it properly? Have you dispelled all the myths regarding capital asset accounting as it applies to local units? It's time to master this complicated form of government accounting and correct any misunderstandings of the past. Attendees should come ready with questions and be eager to drill down!

#### **Cybersecurity – Is your Community Protected? (CMC, MMC)**

Hacking, ransomware, malware, and bots or zombies are just a few cybersecurity terms you should become familiar with in your efforts to make your community's technology safe from thieves. Attendees will leave with a better understanding of where their networks are vulnerable, what to look for and how to defend their technology, and what to do in the event of an attack. Not a computer expert? That's ok. This workshop is designed just for clerks and clerk-treasurers, not IT professionals.

#### **Feeling Confident with Your Presentation Skills (CMC)**

All municipal officials are called upon to do a certain amount of public speaking and presenting before various bodies. Fiscal officers commonly do more such presenting than most public servants, yet not everyone becomes quickly accustomed to maintaining composure while in the spotlight. Attendees will gain valuable presentation skills that will help ensure they are prepared to convey information in the best manner possible.

### **Advanced Project Management Skills and Resources (MMC)**

Are you crazed with everything piling up on your desk while you try to complete a specific project? Attend this session to learn successful project management – how to create a plan, implement it, monitor progress, correct as necessary and deliver results. Take a helter-skelter race with disaster and turn it into an orderly list of objectives needing to be completed. Bring your planners and let's get organized!

### **Thursday, March 9**

#### **Professionalize Your Written Communications (CMC)**

Written communication has become the primary method of communication in today's world. Yet, very few seek to improve their skills. This interactive workshop will help you improve writing skills such as organization, formatting, avoiding common grammar and spelling mistakes and editing. Participants will have the opportunity to work on documents they can use for future communication in the workplace.

#### **The Specifics of Selling and Buying Municipal Property (MMC)**

State law prescribes numerous processes by which a local unit can sell and buy property. A property's value often determines the proper process for its purchase. When buying property, are you getting the right number of appraisals and are your appraisers considered to be qualified under the law? Our expert will walk you through the processes from start to finish and boost your confidence that your community is on the right side of the sale.

#### **When, Where and How: Taxes and your Municipality (CMC)**

Although public entities are exempt from some taxes, there are still many we are responsible for paying, collecting and/or distributing appropriately. This workshop will clear up any tax confusion and help fiscal officers understand which taxes are paid by the municipality, withheld from employees, or collected from customers and constituents. Attendees will also learn of technology they can utilize and who they can contact when they have questions regarding the specific taxes.

#### **Ethical Leadership for Clerks and Clerk-Treasurers (MMC)**

Over the years, many ethical dilemmas have been clarified through the enactment of state laws, thus reducing ambiguity. However, many ethical matters are still prescribed through state agency rulemaking, like INDOT's recent conflict of interest rule. Attendees of this workshop will get a thorough review of ethical laws, rules and best practices for local government fiscal officers.



*For years, ILMCT has worked with Ball State to provide the ILMCT Institute and Academy. We look forward to formalizing our partnership and working with the University for many years to come!*



## Venue

Horizon Convention Center  
401 S. High Street  
Muncie, IN 47305

## Hotel

Courtyard Muncie  
at Horizon Convention Center  
601 S. High Street  
Muncie, IN 47305  
(765) 287-8550  
Room Rate: \$91 per night (plus tax)

The Courtyard is connected by indoor walkway to the Horizon Convention Center. Please contact the Courtyard directly to make your reservation. Request the ILMCT block to receive the special rate of \$91 per night (plus tax). Reservations must be made by 5:00 p.m. (Eastern) on Monday, February 20 to receive the ILMCT rate. ILMCT is not responsible for hotel reservations or cancellations.



## Parking

Parking is complimentary for hotel guests in the hotel parking garage. Limited complimentary surface parking is available for commuters with additional paid parking available in the hotel garage.

## Meeting Materials

Please provide your email address on your registration form. Meeting materials will be emailed to attendees prior to the event via Dropbox. Printed copies will not be available onsite. Please print copies prior to your arrival. Wifi access is complimentary at the Horizon Convention Center, however power outlets may be limited. Bring your device fully charged to the event each day.

## Meals

Included with your registration fee, continental breakfast and lunch will be provided Monday through Thursday and dinner will be provided on Tuesday night at the Convention Center. Pizza will also be served in Conference Room AB at the Courtyard on Sunday evening following class. Monday and Wednesday nights are open for conference attendees to explore Muncie. ILMCT has coordinated events for both evenings, however these events are optional and are not included in your registration fee.

## Conference Attire

Business casual attire is suggested for this event. Event room temperature may vary beyond ILMCT control; please wear layers of clothing for your comfort.

## Special Needs

ILMCT wants to make all events accessible to you. If you require special arrangements or a special diet, please notify ILMCT on your registration form. ILMCT may not be able to accommodate such requests the day of the event.

## Late Registrations

Registrations received after February 21, including onsite registrations, will be subject to a late fee of \$25.

## Cancellation Policy

Written cancellation received on or before February 27 will be refunded less a \$50 administrative fee. Cancellations should be faxed to (317) 237-6206, or sent to [asurgeon@citiesandtowns.org](mailto:asurgeon@citiesandtowns.org). No refunds after February 27.

# 22nd Annual ILMCT Institute & Academy Registration Form

## Registration Deadline: February 21

Full Name
Preferred Name for Badge
Title
Municipality
Address
City/State/Zip
Phone
Email
Please check applicable designations. <input type="checkbox"/> IAMC (Indiana Accredited Municipal Clerk) <input type="checkbox"/> CMC (Certified Municipal Clerk) <input type="checkbox"/> MMC (Master Municipal Clerk) <input type="checkbox"/> CPFA (Certified Public Finance Administrator) <input type="checkbox"/> CPFIM (Certified Public Funds Investment Manager)
Special Needs and Dietary Restrictions

## REGISTRATION FEES

	ILMCT Member	Non-Member	Circle One	
Full Registration	\$450	\$500	Institute	Academy
Sunday	\$60	\$70	Institute	Academy
Monday	\$125	\$135	Institute	Academy
Tuesday	\$125	\$135	Institute	Academy
Wednesday	\$125	\$135	Institute	Academy
Thursday	\$70	\$80	Institute	Academy
Late Fee (registrations received after Feb 21) Add \$25				
Total Amount: \$ _____				

**Mail completed registration form with check made payable to ILMCT:**  
 ILMCT  
 125 W. Market Street, Suite 100  
 Indianapolis, IN 46204

## Institute Sessions & Meals

Please check the events you plan to attend.

<b>Sunday, March 5</b> <input type="checkbox"/> Consolidation of LOITs into One Local Income Tax (LIT) <input type="checkbox"/> Understanding Grassroots Legislative Advocacy and Real-time Updates from the 2017 Legislative Session <input type="checkbox"/> Pizza at Courtyard
<b>Monday, March 6</b> <input type="checkbox"/> Dissecting Payroll and Related HR Matters <input type="checkbox"/> Luncheon <input type="checkbox"/> Accounting Practices & Resources for Fiscal Officers <input type="checkbox"/> Making the Most of Workplace Conflict <input type="checkbox"/> Monday Optional Activity – Scotty's Brewhouse
<b>Tuesday, March 7</b> <input type="checkbox"/> Now, Therefore, Be it Resolved That You Need to Know About Municipal Resolutions, Ordinances and Codifications <input type="checkbox"/> Luncheon <input type="checkbox"/> Making Friends with Gateway <input type="checkbox"/> Internal Controls: An Overview, Best Practices and Lessons Learned <input type="checkbox"/> Dinner Class – Sound Banking Practices and Requirements
<b>Wednesday, March 8</b> <input type="checkbox"/> Disaster Response Accounting: Setting Your Community Up Now For Reimbursement When the Time Comes <input type="checkbox"/> Public Bidding - Start to Finish <input type="checkbox"/> Luncheon <input type="checkbox"/> Cybersecurity – Is Your Community Protected? <input type="checkbox"/> Feeling Confident with Your Presentation Skills <input type="checkbox"/> Wednesday Night Optional Activity – Tonne Winery
<b>Thursday, March 9</b> <input type="checkbox"/> Professionalize Your Written Communications <input type="checkbox"/> When, Where and How: Taxes and your Municipality <input type="checkbox"/> Luncheon & Closing Program

## Academy Sessions & Meals

Please check the events you plan to attend. Attendees must have their CMC.

<b>Sunday, March 5</b> <input type="checkbox"/> Consolidation of LOITs into One Local Income Tax (LIT) <input type="checkbox"/> Understanding Grassroots Legislative Advocacy and Real-time Updates from the 2017 Legislative Session <input type="checkbox"/> Pizza at Courtyard
<b>Monday, March 6</b> <input type="checkbox"/> Taking Budgeting to the Next Level <input type="checkbox"/> Luncheon <input type="checkbox"/> The Whole Package: Grants from A to Z <input type="checkbox"/> Making the Most of Workplace Conflict <input type="checkbox"/> Monday Optional Activity – Scotty's Brewhouse
<b>Tuesday, March 7</b> <input type="checkbox"/> What You Need to Know About Personnel Responsibilities <input type="checkbox"/> Luncheon <input type="checkbox"/> TIF Establishment, Uses and Reporting Requirements <input type="checkbox"/> Internal Controls: An Overview, Best Practices and Lessons Learned <input type="checkbox"/> Dinner Class – Sound Banking Practices and Requirements
<b>Wednesday, March 8</b> <input type="checkbox"/> Disaster Response Accounting: Setting Your Community Up Now For Reimbursement When the Time Comes <input type="checkbox"/> Unlocking the Confusion around Capital Assets Accounting <input type="checkbox"/> Luncheon <input type="checkbox"/> Cybersecurity – Is Your Community Protected? <input type="checkbox"/> Advanced Project Management Skills and Resources <input type="checkbox"/> Wednesday Night Optional Activity – Tonne Winery
<b>Thursday, March 9</b> <input type="checkbox"/> The Specifics of Selling and Buying Municipal Property <input type="checkbox"/> Ethical Leadership for Clerks and Clerk-Treasurers <input type="checkbox"/> Luncheon & Closing Program



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**125 W. Market St., Suite 100**  
**Indianapolis, IN 46204**

