

aim

14th Annual
Clerk-Treasurers
School &
Annual Budget
Workshops

Aim 14th Annual Clerk-Treasurers School

Wednesday, May 10, 2017 Indianapolis Marriott North 3645 River Crossing Parkway Indianapolis, IN 46240

This workshop allows new and experienced clerk-treasurers to develop in their profession. Experts will cover topics such as utility bill collections, new funding tools, preparing for an audit, proper funds management and the clerks role in public meetings.

AGENDA

9:00 a.m. – 9:30 a.m.	Registration	1:00 p.m. – 2:00 p.m.	Crowdfunding and Municipal Government – A New Method for Funding Quality of Place Initiatives
9:30 a.m. – 9:45 a.m.	Welcome and Opening Remarks		Participants in this workshop will learn about Indiana’s newest online funding tool for placemaking projects. Examples of successful projects and advice from participants will give attendees a leg up when applying for this exciting new program!
9:45 a.m. – 10:45 a.m.	How to Address Utility Payments and Deposits with Tenants and Landlords	2:00 p.m. – 2:15 p.m.	Break
	Collecting utility bills can be a challenge under traditional circumstances. Throw in the tenant/landlord relationship and things get even more challenging. Attendees will learn the tools available when addressing deposits, payments, property liens and more.	2:15 p.m. – 3:15 p.m.	Are you prepared for your next audit?
10:45 a.m. – 11:00 a.m.	Break		As the State Board of Accounts increases staff and schedules more frequent municipal audits, it’s even more imperative to be prepared for your next turn under the microscope. Transparency in government is key and presenting your best foot forward in an audit will help inspire constituent confidence in your community.
11:00 a.m. – 12:00 p.m.	Understanding Proper Funds Management	3:15 p.m. – 3:30 p.m.	Break
	Gaming funds are just one example of when it’s critically important to know how to properly account for, transfer and spend certain funds. Having a proper understanding of the most complicated fund requirements will keep you and your community out of trouble. Join this workshop to learn more!	3:30 p.m. – 4:30 p.m.	Examining the Clerks Role in Public Meetings
12:00 p.m. – 1:00 p.m.	Luncheon		All local elected officials have specific roles and responsibilities in the provision of government services. Having a solid understanding of the clerk’s role in executing public meetings will make your job easier and increase your confidence in the public process.
		4:30 p.m.	Adjourn

*Check the Aim website for the latest event information and speaker details.

Indianapolis Budget Workshop & Clerk-Treasurers School

Hotel Reservations

Indianapolis Marriott North
3645 River Crossing Parkway
Indianapolis, IN 46240
(800) 228-9290

Aim Rate: \$149 plus tax

Check-in: 4:00 p.m.

Check-out: 11:00 a.m.

Please contact the Indianapolis Marriott North directly for hotel reservations and request the Accelerate Indiana Municipalities (Aim) Block. Hotel reservations should be made no later than Tuesday, April 25. Aim is not responsible for hotel reservations or cancellations. Complimentary parking available onsite.

Cancellation Policy

Only written cancellations will be accepted. Please mail your written cancellation to 125 W Market Street, Suite 100, Indianapolis, IN 46204, fax to (317) 237-6206 or email to aspurgeon@aimindiana.org Written cancellations received five business days prior to the event will be refunded, minus a \$40 cancellation fee.

Pre-Registration Deadline

The deadline for pre-registration is (4) business days prior to each event. Pre-registration is strongly recommended.

E-Verify

Aim is an enrolled employer in the E-Verify Program verifying the work eligibility of its new employees and will remain so until that program no longer exists.

Aim Annual Budget Workshop

This is a must attend event for anyone involved with the budgeting process. It will inform municipal officials about recent legislative action that affects budgeting, and it will also focus on how to budget for 2018. This workshop teaches the budgeting process from start to finish and the role played by each municipal member.

Offered in Indianapolis and 3 Regional Locations

**All events are on local time. Please note time zone indicated.*

Indianapolis (EST)

Thursday, May 11

Indianapolis Marriott North
3645 River Crossing Parkway
Indianapolis, IN 46240

Jasper (EST)

Tuesday, May 16

KlubHaus 61
2031 Newton Street
Jasper, IN 47546

Fort Wayne (EST)

Wednesday, June 7

Grand Wayne Convention Center
120 W Jefferson Boulevard
Fort Wayne, IN 46802

Munster (CST)

Thursday, June 8

Centennial Park Clubhouse
1005 S Centennial Drive
Munster, IN 46321

AGENDA

9:00 a.m. – 9:30 a.m.	Registration
9:30 a.m. – 9:45 a.m.	Welcome and Opening Remarks Matt Greller, Executive Director & CEO, Aim Linda Sanders, Wessler Engineering
9:45 a.m. – 11:00 a.m.	Managing Legislative Changes Rhonda Cook, Deputy Director and Chief Federal and State Policy Officer, Aim Brian Gould, Director of Government Affairs, Aim Lindsey Moss, Assistant Government Affairs Director & Legislative Counsel, Aim
11:00 a.m.– 11:15 a.m.	Break
11:15 a.m. – 12:30 p.m.	Budget Basics Paige E. Sansone, CPA, Partner, Umbaugh Eric J. Walsh, CPA, Partner, Umbaugh
12:30 p.m. – 1:30 p.m.	Luncheon

1:30 p.m. – 2:15 p.m.	Preparing a Municipal Budget Paige E. Sansone, CPA, Partner, Umbaugh Eric J. Walsh, CPA, Partner, Umbaugh
2:15 p.m. – 3:45 p.m.	Real-Life Budgeting Illustration Paige E. Sansone, CPA, Partner, Umbaugh Eric J. Walsh, CPA, Partner, Umbaugh
3:45 p.m. – 4:00 p.m.	Summary of Takeaways Paige E. Sansone, CPA, Partner, Umbaugh Eric J. Walsh, CPA, Partner, Umbaugh
4:00 p.m.	Adjourn



Earn MMI Credit

Participation in the Aim Annual Budget Workshops are eligible for Municipal Management Institute (MMI) credit. Thank you to MMI sponsor Wessler Engineering.



2017 Annual Budget Workshops & Clerk-Treasurers School

Name		Title	
Municipality/Company			
Address		City/Town	
State	ZIP	Phone	
Email			
Special Needs and Dietary Restrictions			

Budget Workshop			
<input type="checkbox"/> \$119 – Member		<input type="checkbox"/> \$175 – Non-Member	
Select Location:	<input type="checkbox"/> Indianapolis	<input type="checkbox"/> Jasper	<input type="checkbox"/> Fort Wayne <input type="checkbox"/> Munster

Clerk-Treasurers School	
<input type="checkbox"/> \$119 – Member	<input type="checkbox"/> \$175 – Non-Member

Method of Payment		Total: \$	
Circle One:	Check	MC	Visa Discover AmEx
Check Number (Payable to Aim)			
Card Number			
Expiration Date			
Verification Code			
Name of Cardholder			
Billing Address			
City		State	ZIP
Authorized Signature			



125 W Market Street, Suite 100
Indianapolis, IN 46204



14th Annual Clerk-Treasurers School & Annual Budget Workshops