



AIM

AIM NEWLY ELECTED OFFICIALS TRAINING



aim
medical trust
10 Years • *Your Partner for Municipal Health*



bakertilly

MUNICIPAL ADVISORS

now joined with Umbaugh

Aim Newly Elected Officials Training in Partnership with Aim Medical Trust & Baker Tilly Municipal Advisors, LLC

INTRODUCTION

LEARNING THE TOOLS FOR SUCCESS

City and town elected officials truly serve on the front lines of our American democracy. It can be a challenging responsibility, particularly for those recently elected. Yet with the proper preparation and training, municipal officials can assume responsibilities of office, smoothly and effectively.

Every four years, Accelerate Indiana Municipalities (Aim) conducts Newly Elected Officials Training to provide basic information and tools for city and town officials, helping them manage their first weeks in office and build a foundation for a successful term. Four years ago, Aim's Newly Elected Officials Training assisted more than 1,000 city and town officials. The 2019-2020 program, presented in partnership with Aim Medical Trust and Baker Tilly Municipal Advisors, LLC, promises to be bigger and better and will benefit both municipal government newcomers and veterans alike.

There are three phases to the training program. Beginning with a day-long workshop that will be offered in five locations across the state, Regional Training will focus on the first weeks in office. Phase two provides specific training for mayors and clerk-treasurers. Mayors School happens during Regional Training and the Newly Elected Clerk-Treasurers Workshop will be offered in conjunction with Boot Camp. The final component is Aim Boot Camp, a three-day intensive basic training for municipal officials.

INDIANA ELECTED MUNICIPAL OFFICIALS HANDBOOK

The Indiana Elected Municipal Officials Handbook is a 200-page reference guide published by Aim for city and town officials. The handbook reviews the structure and operations of city and town government, applicable statutes and sources of state and federal programs. Each municipal official registered for Boot Camp will receive one of these coveted handbooks.

ABOUT AIM

In 1891, Indiana was one of the first states to form a municipal association, and Aim has a rich tradition of serving municipal government and elected officials. A nonprofit organization, Aim advocates on behalf of municipalities before state lawmakers, and provides education and exclusive networking opportunities to members. Aim is the official voice of municipal government in Indiana.

The non-partisan association is governed by officers and a board of directors and relies upon various committees to govern its agendas and set policies. Members of the board of directors represent diverse municipal elected offices, sizes of municipalities and geographic areas of the state. Maintaining non-partisanship is an important part of the association's governance.

ABOUT AIM MEDICAL TRUST

The Aim Medical Trust provides cities and towns across Indiana with a fiscally responsible approach to healthcare. The Trust is a risk-sharing pool managing the health care costs of 4,000 municipal employees and their families, providing long-term financial stability of premiums with quality health care plans for its 47 member communities. The Trust is part of Aim, an organization you know, serving Indiana's cities and towns for more than 125 years.

The insurance plans provided by the Trust range from traditional PPO plans with low deductibles to high-deductible, consumer driven health plans. Municipal members also have the option to purchase life, dental, vision, and disability coverage through the Trust at competitive rates. This self-funded program is owned by the participating members, managed by Aim, governed by a Board of Trustees, and regulated by the Indiana Department of Insurance.

PHASE 1
BASIC SURVIVAL
SKILLS

AIM REGIONAL TRAINING

Aim Regional Training sessions are held in the weeks following municipal elections. The day-long workshop will be offered in five locations across the state and will focus on the first weeks in office, including what to expect at the first council meeting. You will be given critical tools that you will need during transition and when you hit the ground running on day-one. These training sessions are staffed by veteran municipal officials, Aim staff and leading municipal experts.

AGENDA <small>All times are local.</small>	
8:30 AM	Registration
9:00 AM	Welcome & Opening Remarks
9:30 AM	Municipal Government — A Nuts and Bolts Overview
10:15 AM	Break
10:30 AM	The Legal Side — Common Transitional Challenges and Questions
11:10 AM	Understanding Employment Issues BEFORE Day 1
12:00 PM	Lunch with Question and Answer Session
1:00 PM	Meetings and Public Access Dos and Don'ts
1:45 PM	Municipal Finance and Budgeting
2:30 PM	Break
2:40 PM	Your First Days in Office
3:40 PM	Closing Remarks
3:45 PM	Adjourn

LOCATION / DATE	ADDRESS
MUNSTER TUESDAY, DECEMBER 3	Centennial Park 1005 South Centennial Drive Munster, IN 46321
EVANSVILLE MONDAY, DECEMBER 9	Old National Events Plaza 715 Locust Street Evansville, IN 47708
JEFFERSONVILLE TUESDAY, DECEMBER 10	Sheraton Louisville Riverside Hotel 700 W Riverside Drive Jeffersonville, IN 47130
NOBLESVILLE SATURDAY, DECEMBER 14	Embassy Suites Noblesville Indianapolis Conference Center 13700 Conference Center Drive South Noblesville, IN 46060
FORT WAYNE TUESDAY, DECEMBER 17	Grand Wayne Center 120 W Jefferson Boulevard Fort Wayne, IN 46808

4 EASY WAYS TO REGISTER

1. Register online at www.aimindiana.org/neo
2. Complete registration form with payment and mail to Aim
3. Fax completed registration form with credit card information to (317) 237-6206
4. Email completed registration form to Kyle Lubelski at klubelski@aimindiana.org

ABOUT BAKER TILLY MUNICIPAL ADVISORS, LLC

Baker Tilly Municipal Advisors work with communities to help resolve financial issues to improve your operations and the quality of life for your communities. Because we are a certified public accounting firm, we pair the ethics, structure, quality control, and business discipline of a CPA firm with the skills

and knowledge of a municipal financial advisor. We specialize in advising governments, including cities, towns, villages, townships, counties, authorities, utilities, public schools, and libraries, as well as higher education, healthcare entities, and economic development organizations.

PHASE 2
CLASSROOM
INSTRUCTION

AIM MAYORS SCHOOL

DECEMBER 11-13

Embassy Suites Noblesville Indianapolis Conference Center
13700 Conference Center Drive South
Noblesville, IN 46060

Mayors School is an in-depth conference offered specially for Indiana mayors and will arm them with the knowledge and confidence to meet the challenges that come with a new term in office. The intensive schedule, tailored to mayors of all sized communities, provides both detailed instruction and round-table style interaction. Mayors School allows newly elected mayors to meet and quickly begin establishing relationships with one another and the many veteran mayors who will be in attendance.

AGENDA	
WEDNESDAY, DECEMBER 11	
3:30 PM	Registration
4:30 PM	Getting Acquainted Session and Introduction of New Mayors
5:30 PM	Networking Suite
7:00 PM	Evening Open for Sponsor Events
THURSDAY, DECEMBER 12	
7:30 AM	Registration
8:00 AM	Continental Breakfast
9:00 AM	Opening Session and Welcome
9:15 AM	Transitioning from the Campaign to City Hall
10:00 AM	Break
10:15 AM	Municipal Finance
11:15 AM	Keeping Out of Trouble with the 1st Amendment Rights of Employees
12:00 PM	Luncheon and Quality of Life Panel Discussion
1:15 PM	Media Relations and the Mayor

THURSDAY CONTINUED	
2:15 PM	Public Safety Issues
3:15 PM	Break
3:30 PM	Peer Networking Session
5:30 PM	Mayors Only Private Event Sponsored by Aim Medical Trust
7:00 PM	Reception — Open to All Attendees
9:00 PM	Networking Suite
FRIDAY, DECEMBER 13	
7:30 AM	Breakfast
8:45 AM	Municipal Growth & Development
9:45 AM	Break
10:00 AM	The Mayor's Role in Promoting Economic Development
11:00 AM	The Role of Mayor Beyond City Limits
11:30 AM	Taking it Home
11:45 AM	Adjourn

Hotel Reservations

Hotel reservations can be made by contacting the Embassy directly at (317) 674-9044. Request the Aim 2019 Mayors School room block to receive the special rate of \$151.00 per night. Reservations must be made by November 21 at 3:00 p.m. to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and sponsors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.

AIM CLERK-TREASURERS WORKSHOP

JANUARY 21

THE WESTIN INDIANAPOLIS
50 South Capitol Avenue
Indianapolis, IN 46204

Offered in conjunction with Aim Boot Camp, Aim Clerk-Treasurers Workshop is a critical gathering of elected municipal fiscal officers and is a must attend for new and veteran clerk-treasurers. Referenced as a “called meeting” by the Indiana State Board of Accounts (SBOA), the workshop will offer timely instruction on the state’s expectations of its newest fiscal stewards.

AGENDA	
8:30 AM	Registration & Orientation for New Clerk-Treasurers hosted by Indiana League of Municipal Clerks & Treasurers (ILMCT) <i>Refreshments available</i>
9:30 AM	Welcome & Opening Remarks Matthew C. Greller, Chief Executive Officer, Aim Paul Joyce, CPA, State Examiner, SBOA Karen McQueen, Clerk-Treasurer, Brazil and President, ILMCT
9:45 AM	Orientation to the Office of Clerk-Treasurer and the Role of the State Board of Accounts (SBOA) Todd Caldwell, Director of Audit Services, SBOA Susan Gordon, CPA, Director of Audit Services, SBOA
10:45 AM	Break
11:00 AM	The Role of the Department of Local Government Finance (DLGF)

12:00 PM	Lunch
1:00 PM	Important Topics for Clerk-Treasurers Todd Caldwell, Director of Audit Services, SBOA Susan Gordon, CPA, Director of Audit Services, SBOA
2:00 PM	Break
2:15 PM	More Important Topics for Clerk-Treasurers Todd Caldwell, Director of Audit Services, SBOA Susan Gordon, CPA, Director of Audit Services, SBOA
3:30 PM	Question and Answer Session Todd Caldwell, Director of Audit Services, SBOA Susan Gordon, CPA, Director of Audit Services, SBOA
4:00 PM	Adjourn

***Fiscal Officers:** State Board of Accounts School registration and related travel expenses may be paid from the General Fund from any money not otherwise appropriated. See I.C. 5-11-14

Hotel Reservations

Hotel reservations can be made by contacting the Westin directly at (317) 262-8100. Request Aim Newly Elected Officials 2020 room block to receive the special rate of \$142.00 per night. Reservations must be made by January 3 at 5:00 p.m. to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and exhibitors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.

PHASE 3

THE FINAL
DRILL

AIM BOOT CAMP

JANUARY 21-23

THE WESTIN INDIANAPOLIS

50 South Capitol Avenue
Indianapolis, IN 46204

The final drill of NEO training is Aim Boot Camp. Just like it sounds, Boot Camp is an intensive three-day conference that is jam-packed with instruction from veteran municipal officials and experts in municipal government. A look into the basic operations of government, detailed overviews of municipal finance and budgeting, ethics, purchasing and much more will be covered by our respected panelists of veteran officials and experts.

Boot Camp promises to be that one place where those new to an office or administration can go get their questions answered. For veteran municipal officials, Boot Camp offers many opportunities to refresh your skills and brush up on some of the latest laws and best practices. Highlights of the three-day event are extensive workshops, several peer networking opportunities, a can't-miss exhibit hall packed with municipal experts, and your own copy of the sought after 2020 Aim Indiana Elected Municipal Officials Handbook.

AGENDA	
TUESDAY, JANUARY 21	
11:00 AM - 5:00 PM	Boot Camp Registration
2:00 - 7:00 PM	Exhibit Hall Open
4:00 - 5:00 PM	Early-Bird Workshops <ul style="list-style-type: none"> Quality of Place/Regionalism Basic Training – Advocating for your Community and Aim at the Indiana Statehouse Tax Increment Financing
5:00 - 7:00 PM	Welcome Reception in Exhibit Hall
7:00 PM	Grand Prize Giveaway in Exhibit Hall
WEDNESDAY, JANUARY 22	
8:00 - 9:00 AM	Registration
8:00 - 9:00 AM	Continental Breakfast
9:00 - 10:30 AM	Opening General Session
10:45 - 12:00 PM	Concurrent Workshops <ul style="list-style-type: none"> Class 1 & 2 Cities Class 3 Cities Towns above 2,000 Towns below 2,000
12:00 - 2:00 PM	Luncheon & Featured Speaker
2:15 - 3:30 PM	Concurrent Workshops <ul style="list-style-type: none"> Public Records & Open Door Law Ethics & Conflict of Interest Public Safety Public Works & Utilities
3:45 - 5:00 PM	Concurrent Workshops <ul style="list-style-type: none"> Public Records & Open Door Law Ethics & Conflict of Interest Code Enforcement Aim Medical Trust
6:30 PM	Dinner & Featured Speaker

THURSDAY, JANUARY 23	
7:30 - 8:30 AM	Continental Breakfast
8:30 - 9:30 AM	Peer Networking Sessions <ul style="list-style-type: none"> Mayors Town Council Members Municipal Managers City Council Members Fiscal Officers & Clerks Department Heads & Staff
9:45 - 11:00 AM	Concurrent Workshops <ul style="list-style-type: none"> Budgets Contracts & Purchasing Human Resources Public Finance
11:15 - 12:30 PM	Concurrent Workshops <ul style="list-style-type: none"> Code Enforcement Public Meeting Management Human Resources Transportation Funding
12:30 - 2:00 PM	Closing Luncheon

Hotel Reservations

Hotel reservations can be made by contacting the Westin directly at (317) 262-8100. Request the Aim Newly Elected Officials 2020 room block to receive the special rate of \$142.00 per night. Reservations must be made by January 3 at 5:00 p.m. to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and exhibitors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.

AIM NEWLY ELECTED OFFICIALS TRAINING REGISTRATION FORM

Complete the form with payment and mail to Aim at 125 W Market Street, Suite 100, Indianapolis, IN 46204

FULL NAME
PREFERRED NAME FOR NAME BADGE
TITLE
MUNICIPALITY
ADDRESS
CITY / STATE / ZIP

PHONE
EMAIL (Required)
SPOUSE / GUEST NAME
SPECIAL NEEDS AND DIETARY RESTRICTIONS
NEWLY ELECTED OFFICIAL (Circle one) Yes No

REGISTRATION FEES

REGIONAL TRAINING			
LOCATION	BY NOV 25	AFTER NOV 25	AMOUNT
DEC 3 / MUNSTER	\$99	\$119	
DEC 9 / EVANSVILLE	\$99	\$119	
DEC 10 / JEFFERSONVILLE	\$99	\$119	
DEC 14 / NOBLESVILLE	\$99	\$119	
DEC 17 / FORT WAYNE	\$99	\$119	
MAYORS SCHOOL			
ATTENDEE	BY DEC 2	AFTER DEC 2	AMOUNT
MUNICIPAL OFFICIAL	\$190	\$210	
*SPOUSE / GUEST	\$79	\$99	
CLERK-TREASURERS WORKSHOP			
ATTENDEE	BY DEC 30	AFTER DEC 30	AMOUNT
MUNICIPAL OFFICIAL	\$99	\$119	
BOOT CAMP			
ATTENDEE	BY DEC 30	AFTER DEC 30	AMOUNT
MUNICIPAL OFFICIAL	\$299	\$319	
*SPOUSE / GUEST	\$199	\$219	
TOTAL AMOUNT DUE:			

**The spouse/guest registration fee is restricted to those who are not municipal officials or employees and who have no professional interest in the conference. The fee includes admission to all conference social events and meals. Boot Camp registration also includes admission to the exhibit hall.*

REIMBURSEMENT AND REFERENCE MATERIALS

Attendees of NEO events will be provided a Dropbox link to helpful reference materials. Included in these materials will be a detailed memo regarding how elected officials in transition can be reimbursed for Aim Newly Elected Officials Training expenses. This memo can also be viewed online at www.aimindiana.org/neo.

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 send to klubelski@aimindiana.org. Written cancellations received five business days prior to the event, will be refunded less a \$40 processing fee. Aim is not responsible for hotel reservations or cancellations.

METHOD OF PAYMENT

<input type="checkbox"/> CHECK	<input type="checkbox"/> VISA	<input type="checkbox"/> MASTERCARD	<input type="checkbox"/> DISCOVER	<input type="checkbox"/> AMEX
CHECK # (Payable to Aim)				
CARDHOLDER NAME				
CREDIT CARD NUMBER				
EXPIRATION DATE				
VERIFICATION CODE				
BILLING ADDRESS				
CITY/STATE/ZIP				
SIGNATURE OF CARDHOLDER				

PLEASE CHECK THE BOOT CAMP EVENTS YOU PLAN TO ATTEND:

(For planning purposes only. No extra fees apply.)

<input type="checkbox"/> TUESDAY WELCOME RECEPTION IN THE EXHIBIT HALL
<input type="checkbox"/> WEDNESDAY CONTINENTAL BREAKFAST
<input type="checkbox"/> WEDNESDAY LUNCHEON
<input type="checkbox"/> WEDNESDAY DINNER
<input type="checkbox"/> THURSDAY CONTINENTAL BREAKFAST
<input type="checkbox"/> THURSDAY CLOSING LUNCHEON

SPECIAL NEEDS AND DIETARY RESTRICTIONS DUE TO ALLERGIES

Aim wants to make the conference accessible to you. If you require special arrangements or a special diet due to allergies, please notify Aim on your registration form. We may not be able to accommodate such requests made the day of the event. Meeting room temperatures may vary beyond our control; please wear layers of clothing for your comfort.

E-VERIFY COMPLIANCE

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

REGISTER TODAY

AIM NEWLY ELECTED OFFICIALS TRAINING

**REGIONAL
TRAINING**

**MAYORS
SCHOOL**

**CLERK-
TREASURERS
WORKSHOP**

**BOOT
CAMP**

NEO
AIM NEWLY ELECTED OFFICIALS TRAINING