



**BALL STATE  
UNIVERSITY**

# **25<sup>th</sup> Annual ILMCT Institute & Academy**

**March 8 - 12, 2020 | Muncie, IN**

**Join us in Muncie for the 25th Annual ILMCT Institute & Academy where you will spend the week diving into topics focused specifically on the role of the municipal clerk and clerk-treasurer. Attend an abundant lineup 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.**

## **Institute & Academy Update**

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ILMCT and Ball State University have been partners for decades. Our ongoing collaboration to provide Hoosier clerks and clerk-treasurers with quality continuing education through the ILMCT Institute & Academy is going strong. This partnership, when coupled with a strong partnership with the International Institute for Municipal Clerks, ILMCT Institute & Academy is better than ever!



## 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 8		10:00 a.m. – 12:00 p.m.	Institute Class – Effective Spreadsheet Development
12:00 p.m. – 5:00 p.m.	Registration	10:00 a.m. – 12:00 p.m.	Academy Class – Tax Structure
1:00 p.m. – 2:00 p.m.	Opening Session	12:00 p.m. – 1:00 p.m.	Luncheon
2:00 p.m. – 4:00 p.m.	<b>Institute &amp; Academy Class</b> – American Government	1:00 p.m. – 3:00 p.m.	<b>Institute Class</b> – Trends in Software and Digital Applications
4:00 p.m. – 6:00 p.m.	<b>Institute &amp; Academy Class</b> – Oaths, Ceremonies, & Acknowledging Acts	1:00 p.m. – 3:00 p.m.	<b>Academy Class</b> – Generational Diversity
6:30 p.m.	Pizza at Courtyard	3:00 p.m. – 5:00 p.m.	<b>Institute &amp; Academy Class</b> – Solving Your Pothole Problems (Road Funding 101)
Monday, March 9		7:00 p.m. – 9:30 p.m.	<b>ILMCY Institute &amp; Academy Presents—<i>Why They Do it: A Look at White &amp; Pink Collar Crimes</i></b> <i>Sponsored by LWG CPAs &amp; Advisors</i>
7:30 a.m. – 8:00 a.m.	Registration & Breakfast	Wednesday, March 11	
8:00 a.m. – 4:00 p.m.	State Board of Accounts Resource Center	7:30 a.m. – 8:00 a.m.	Registration & Breakfast
8:00 a.m. – 10:00 a.m.	<b>Institute &amp; Academy Class</b> – Understanding the Legislative Process	8:15 a.m. – 10:15 a.m.	<b>Institute &amp; Academy Class</b> – Your Role in Local Government
10:00 a.m. – 12:00 p.m.	<b>Institute Class</b> – Nuts & Bolts: Part I	10:15 a.m. – 12:15 p.m.	<b>Institute &amp; Academy Class</b> – Do the Right Thing
10:00 a.m. – 12:00 p.m.	<b>Academy Class</b> – Mentoring	12:15 p.m. – 1:15 p.m.	Luncheon
12:00 p.m. – 1:15 p.m.	Luncheon	1:30 p.m. – 4:30 p.m.	<b>Institute Class</b> – Building Budgets
1:30 p.m. – 3:30 p.m.	<b>Institute Class</b> – Nuts & Bolts: Part II	1:30 p.m. – 4:30 p.m.	<b>Academy Class</b> – Developing and Leading a Team
1:30 p.m. – 3:30 p.m.	<b>Academy Class</b> – Using Your Tools of Influence	Thursday, March 12	
3:30 p.m. – 4:30 p.m.	<b>Institute &amp; Academy Class</b> – ADA Regulations	7:30 a.m. – 8:00 a.m.	Registration
Tuesday, March 10		8:00 a.m. – 10:00 a.m.	<b>Breakfast / Institute &amp; Academy Class</b> – HR Case Scenarios
7:30 a.m. – 8:00 a.m.	Registration & Breakfast	10:00 a.m. – 12:00 p.m.	<b>Institute &amp; Academy Class</b> – Cyber Security
8:00 a.m. – 10:00 a.m.	<b>Institute Class</b> – Tax Structure		
8:00 a.m. – 10:00 a.m.	<b>Academy Class</b> – Time Management		

# Educational Sessions

## Sunday, March 8

### American Government (Institute & Academy)

Every Indiana Clerk and Clerk-Treasurer, before assuming his or her duties, must offer an oath to uphold the Constitution of the United States and the State of Indiana. What does this all mean? Participants will experience a survey of American Government fostering greater understanding of the relationship and interdependence of the national, state, and local governments in the USA, exploring concepts such as federalism, separation of powers, checks and balances, and related seminal democratic ideas. A discussion and examination of key US and state constitutional provisions will also be featured to assist in Indiana Clerks and Clerk-Treasurers to more fully appreciate their place in American government.

### Oaths, Ceremonies & Acknowledging Acts (Institute & Academy)

Administering oaths is one of the duties of the Clerk and Clerk-Treasurer. Learn more about the origin, history, and application of Oaths, and Ceremonial and Acknowledging Acts.

## Monday, March 9

### Understanding the Legislative Process (Institute & Academy)

There is an increasing need in the State of Indiana for elected officials to be aware of and actively involved in the legislative process because of potential changes that could significantly affect their offices. This session will focus on understanding the process of how thoughts and ideas become law in order to know how to effectively reach out to members of the legislature to convey their view and recommendations.

### Nuts & Bolts: Part I (Institute)

This workshop is intended for Clerk-Treasurers in their first term to provide basic information and resources to get you through the first year with confidence, as well as provide a review of the duties for those who have been in office for some time. Topics to be covered are: daily, weekly, monthly and annual duties; various agencies; funds; payroll; budget and budget orders; taxes; bank reconciliations; ledger or receipts and disbursement; ledge or appropriations; transfers; resolutions; ordinances; claims and minutes, mentoring, acronyms, and audits.

### Mentoring (Academy)

As an important mission of ILMCT, this workshop will provide advice and helpful tools to the seasoned Clerks and Clerk-Treasurers so they are fully equipped to provide assistance to newly elected officials during their first years in office. Knowing which agencies to contact, where to find answers, the best utilization of the ILMCT listserv, and how to search statutes within the Indiana Code, are just some of items on the docket for this important session. Potential mentors will walk away ready to provide the guidance and support necessary for new and potentially struggling colleagues.

### Nuts & Bolts: Part II (Institute)

This workshop is intended for Clerk-Treasurers in their first term to provide basic information and resources to get you through the first year with confidence, as well as provide a review of the duties for those who have been in office for some time. Topics to be covered are: daily, weekly, monthly, and annual duties; various agencies; funds; payroll; budget and budget orders; taxes; bank reconciliations; ledger or receipts and disbursement; ledge or appropriations; transfers; resolutions; ordinances; claims and minutes, mentoring, acronyms, and audits.

## Monday Continued

### Using Your Tools of Influence (Academy)

Fulfilling your role as Clerk or Clerk-Treasurer requires gaining the support of a wide variety of people: staff members, other elected officials, and community leaders. Success requires developing multiple tools for exercising influence and persuasion. This session will help you identify these methods of influence and persuasion and decide which you should use in a given situation.

### ADA Regulations (Institute & Academy)

Accessibility compliance is a mandatory obligation under the Americans with Disability Act. Meeting obligations can help protect against litigation. This session will provide you with information to ensure your community is in compliance with these guidelines.

## Tuesday, March 10

### Tax Structure (Institute)

Local governments provide a wide variety of services to Indiana residents, which are financed by some combination of taxes, local revenues, and state aid. In Indiana, three major taxes provide most local government tax revenue: property taxes, local income taxes, and motor vehicle excise taxes. This session will examine the basic tax structure and how those funds are distributed.

### Time Management (Academy)

Do you feel like you are just spinning your wheels in your work? Do you struggle with finding enough time to do the really important tasks associated with your job? This session will help you identify time wasters, prioritize your tasks, and learn how to manage your energy, not just your time. Participants will examine the need to focus our time on "Important, Not Urgent" activities to increase efficiency and effectiveness.

### Effective Spreadsheet Development (Institute)

Participants will learn how to enhance budgeting, billing, bank reconciliation, preparing monthly financial statements, and other functions of the Clerk-Treasurer's office through the effective use of spreadsheets. The development and use of spreadsheets will be taught using actual budget and accounting documents used in the office of the Clerk-Treasurer.

### Tax Structure (Academy)

Local governments provide a wide variety of services to Indiana residents, which are financed by some combination of taxes, local revenues, and state aid. In Indiana, three major taxes provide most local government tax revenue: property taxes, local income taxes, and motor vehicle excise taxes. How these and the remaining miscellaneous revenues are assessed or calculated is complex and a failure to understand the details can lead to poor planning and budgeting. Completing this workshop will result in a deeper understanding of municipal finance and more effective long-term forecasting.

### Trends in Software and Digital Applications (Institute)

There are too many specific products designed to help with workflow management, project management, and document management to identify by name. Before you can find a product that's right for your community, you have to understand your needs and what kind of system(s) will help. Participants will walk through how to properly identify problems and solutions to several common process-related challenges, resulting in greater efficiencies and more accurate, timely work products.



## Tuesday Continued

### Generational Diversity (Academy)

Using an innovative, proprietary, Generation Game Board, attendees will explore the various, social, political, and economic influences that shaped the working attitudes of the Greatest Generation, Baby Boomers, Generational X, Millennials and now Generation Z. The game creates interesting, and informative, conversation among participants from various generations. This workshop will equip participants to be more effective communicators and leaders through understanding the various generations in the workplace today.

### Solving Your Pothole Problems (Road Funding 101) (Institute & Academy)

Is how to pay for road repairs and improvements a concern for your City or Town? This session will identify potential solutions to enable your municipality to meet paving needs. Topics for discussion will include Community Crossings, prioritizing and integrating road improvements into your multi-year capital plan, funding options, and legislative updates. The funding portion of the workshop will focus on revenue sources (both existing and unconventional), the impact on your budget, and the role of the DLGF.

### Movie & Snacks— “Why they Do It: A Look at White & Pink Collar Crime” (Institute & Academy)

*Sponsored by LWG CPAs & Advisors*

As a follow-up to last year's presentation of *All the Queen's Horses*, this evening presentation focus on fraud from the “why” perspective and the varied attitudes when comparing fraudsters from other criminals. Several short subject videos will be followed with group discussions. Relevant local examples that have impacted local governments and communities will also be presented.

## Wednesday, March 11

### Your Role in Local Government (Institute & Academy)

The roles of Hoosier Clerks and Clerk-Treasurers is mostly defined by statute and via the various required reports, internal controls, and principles that must be followed. An overview of duties will be followed by a deeper dive into how Clerks and fiscal officers can have a more meaningful voice in the community and within the municipal government hierarchy. How and when to use the bully pulpit can result in positive community outcomes and more effective leadership.

## Wednesday Continued

### Do the Right Thing (Institute & Academy)

This presentation will cover the importance of making “ethics” the brand of your office. It will address the key ingredients of an ethical workplace. The interactive presentation will help attendees identify and navigate ethical dilemmas.

### Building Budgets (Institute)

The session will provide an overview of the budget process and the related statutory deadlines. Participants will be introduced to basic budget terminology and the steps necessary to complete a budget. The class will also include a demonstration on how to complete the prescribed budget documents.

### Developing and Leading a Team (Academy)

A team is a collection of individuals organized to accomplish a common purpose. An effective leader knows how to help each member of the team succeed and thus ensure the success of the team through the facilitation of mutual respect, improved communication, and deepening understanding. In this interactive session you will learn the stages of team development, the difference between managing and leading a team, and how to bring out your true potential as a leader by developing both your skills and your character.

## Thursday, March 12

### HR Case Scenarios (Institute & Academy)

Now after taking office you find HR is also your responsibility. See the ins and outs of the application process, interviewing, on boarding, and firing by experiencing first-hand how the HR process works.

### Cyber Security (Institute & Academy)

Clerks and Clerk-Treasurers handle many sensitive data files. In today's digital environment, vigilance against cyber intruders are not only wise, it's your civic duty. Participants in this class will learn about the latest cyber threats, how to protect against them and respond effectively if and when an intrusion does occur. A sound plan will result in greater public trust and confidence in your stewardship.



# Hotel and Venue Information



## Hotel

Courtyard Muncie  
at Horizon Convention Center  
601 S. High Street  
Muncie, IN 47305  
(765) 287-8550  
Room Rate: \$94 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 \$94 per night (plus tax). Reservations must be made by 5:00 p.m. (Eastern) on Friday, February 21 to receive the ILMCT rate. ILMCT is not responsible for hotel reservations or cancellations.

## Venue

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

**Mail completed registration form with check made payable to ILMCT or completed credit card information:**

ILMCT  
125 W. Market Street, Suite 100  
Indianapolis, IN 46204

### 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 or save files to your device 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.

### 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.

### 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.

### Late Registrations

Registrations received after February 28, including onsite registrations, will be subject to a late fee of \$25.

### Cancellation Policy

Written cancellation received on or before February 28 will be refunded less a \$50 administrative fee. Cancellations should be faxed to (317) 237-6206, or sent to klubelski@aimindiana.org. No refunds after February 28.

### Meals

Included with your registration fee, continental breakfast will be provided Monday through Thursday and lunch will be provided Monday through Wednesday. 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.

### Special Needs

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

# 25th Annual ILMCT Institute & Academy Registration Form

**Registration Deadline: February 28**

Full Name
Preferred Name for Badge
Municipality
Title
Address
City/State/Zip
Phone
Email
First Time Attendee <input type="checkbox"/> YES <input type="checkbox"/> NO
Special Needs and Dietary Restrictions

Amount:
Circle One: Check MC Visa Discover AmEx
Check Number (Payable to ILMCT)
Card Number
Expiration Date Verification Code
Name of Cardholder
Billing Address
City/State/Zip
Cardholder Signature

## Institute Sessions & Meals

Please check the events you plan to attend. The sessions below count towards CMC credit only.

<b>Sunday, March 8</b>
<input type="checkbox"/> American Government <input type="checkbox"/> Oaths, Ceremonies, & Acknowledging Acts <input type="checkbox"/> Pizza at Courtyard
<b>Monday, March 9</b>
<input type="checkbox"/> Understanding the Legislative Process <input type="checkbox"/> Nuts & Bolts – Part I <input type="checkbox"/> Luncheon <input type="checkbox"/> Nuts & Bolts – Part II <input type="checkbox"/> ADA Regulations
<b>Tuesday, March 10</b>
<input type="checkbox"/> Tax Structure <input type="checkbox"/> Effective Spreadsheet Development <input type="checkbox"/> Luncheon <input type="checkbox"/> Trends in Software and Digital Applications <input type="checkbox"/> Solving Your Pothole Problems (Road Funding 101) <input type="checkbox"/> Movie & Snacks – ILMCT Institute & Academy
<b>Wednesday, March 11</b>
<input type="checkbox"/> Your Role in Local Government <input type="checkbox"/> Do the Right Thing <input type="checkbox"/> Luncheon <input type="checkbox"/> Building Budgets
<b>Thursday, March 12</b>
<input type="checkbox"/> HR Case Scenarios <input type="checkbox"/> Cyber Security

## Academy Sessions & Meals

Please check the events you plan to attend. The sessions below count towards CMC or MMC credit. You may only earn MMC credit for these sessions, if you already have received your CMC.

<b>Sunday, March 8</b>
<input type="checkbox"/> American Government <input type="checkbox"/> Oaths, Ceremonies, & Acknowledging Acts <input type="checkbox"/> Pizza at Courtyard
<b>Monday, March 9</b>
<input type="checkbox"/> Understanding the Legislative Process <input type="checkbox"/> Mentoring <input type="checkbox"/> Luncheon <input type="checkbox"/> Using Your Tools of Influence <input type="checkbox"/> ADA Regulations
<b>Tuesday, March 10</b>
<input type="checkbox"/> Time Management <input type="checkbox"/> Tax Structure <input type="checkbox"/> Luncheon <input type="checkbox"/> Generational Diversity <input type="checkbox"/> Solving Your Pothole Problems (Road Funding 101) <input type="checkbox"/> Movie & Snacks – ILMCT Institute & Academy
<b>Wednesday, March 11</b>
<input type="checkbox"/> Your Role in Local Government <input type="checkbox"/> Do the Right Thing <input type="checkbox"/> Luncheon <input type="checkbox"/> Developing and Leading a Team
<b>Thursday, March 12</b>
<input type="checkbox"/> HR Case Scenarios <input type="checkbox"/> Cyber Security

## REGISTRATION FEES

	Full Registration	Sunday	Monday	Tuesday	Wednesday	Thursday
ILMCT Member	\$450	\$60	\$125	\$125	\$125	\$70
Non-Member	\$500	\$70	\$135	\$135	\$135	\$80
Late Fee (received after Feb 28) Add \$25						



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