



# Aim Ideas SUMMIT

October 6 – October 8, 2020

## AGENDA

### Tuesday, October 6

9:45 a.m. – 9:55 a.m. Exhibit Hall Kick Off

9:45 a.m. – 4:00 p.m. Exhibit Hall Open

10:00 a.m. – 11:30 a.m. Early Bird Workshops

#### **Economic Development in Challenging Times *(CLE Pending)***

The state of Indiana and its cities and towns face an uncertain economy now and in the near future. As a result of the national public health emergency, every sector of the state's economy is seeing a decline in revenue projections. State revenues of every type are down. The workshop will review the near-term impact of declining revenues on local and regional projects, focus on what steps Indiana cities and towns can take to minimize the effect of declining revenues on economic development activities, and discuss ways in which local communities can be part of the economic recovery.

#### **Speakers:**

**Karen Arland**, Attorney, Kennedy Downs & Arland PC

**Buddy Downs**, Attorney, Kennedy Downs & Arland PC

**Les Merkley**, City Attorney, Jeffersonville

### **On the Pathway to Racial Equity**

Racial equity defined: Just and fair inclusion in a society in which everyone, regardless of race, can live fully, participate, and reach their full potential. All peoples, cultures and identifies are equally valued and recognized in the belief that strength comes through diversity and expression of our shared humanity. What does this mean? What does it look like? What does it take to achieve it? Each individual will experience the conversation differently and what determined a diverse and racially equitable organization will also vary. This workshop will examine these questions, as well as the issue of conscious and unconscious biases through use of an implicit bias exercise.

#### **Speaker:**

**Myra Selby**, Attorney, Ice Miller LLP

### **Social Distancing in Public Spaces**

With most of 2020 influenced by the COVID-19 Pandemic, how will the need for social distancing, sanitized surfaces, etc. affect the design and operations of our parks, playgrounds, etc. The workshop will examine concerns and considerations for designs, examples of community efforts, and an idea exchange among attendees.

#### **Speakers:**

**Jeff Hirsch**, PLA, LEED AP, Landscape Architecture Department Manager, DLZ Indiana, LLC

**Chris Jensen**, Mayor, Noblesville

**Jonathan Mooney**, PLA, Project Manager, DLZ Indiana LLC

11:30 a.m. – 12:15 p.m. Lunch Break

12:15 p.m. – 1:45 p.m. Early Bird Workshops

### **How to Spot and Prepare for the Next Extraordinary Event**

An extraordinary event is one that is highly improbable, carrying an extreme impact, lying outside the realm of ordinary expectations. These random and unexpected events can have

devastating effects and huge ramifications for your municipality. A key element of an extraordinary event is that while they are unanticipated, in hindsight we can see what could have been done or should have been done to prepare for these events. While we seem to be able to learn from recent events, how can we better anticipate and prepare for the next? Is there a way to prepare for an impossible or highly improbable event? Because when they happen, even globally, we must respond locally. What can we learn from the events of 2020, to better prepare us for the future? This session will explore the issues surrounding preparing for and even thinking about events we can hardly imagine.

**Speakers:**

**John McKnight**, President, Bliss McKnight Inc.

**Terry Seitz**, Outreach Director, Office of U.S. Senator Mike Braun

**Wayne Seybold**, Chief Revenue Officer, Idilus HR

**Saving Green by Going Green**

Producing energy from the reuse of fat, oil, and grease, turning steam into an asset, looking for energy savings in your wastewater treatment plant, and broadly examining your behaviors with an eye for change, are just some of the ways you can begin making your community more sustainable. The best practices and expert advice reviewed by this panel will leave all attendees excited to begin or supplement sustainable practices in their hometown!

**Speakers:**

**Douglas Fasick**, C.E.M., Manager of Engineering, Energy Engineering & Sustainability Services, Fort Wayne City Utilities

**Warren High**, Senior Project Manager, Christopher B. Burke Engineering, LLC

**Mike Lindsey**, Performance Assurance and Energy Leadership Manager, Performance Services, Inc.

**Jim Shields**, State Engineer, Aqua Indiana

## **Unit-Wide Comprehensive Long-Term Operational & Capital Improvement Planning *(CLE Pending)***

Local government management can be a daunting task. The sheer volume of moving parts can easily overwhelm, when left unchecked. We might be doing okay this year, but what about two years from now? We must manage this year while also thinking about the next three or more years. How do we manage our economic development, financial, and capital improvement goals, while also meeting or exceeding our operational (essential service) goals? This presentation will address and discuss how to take a holistic approach to operational and capital planning within your unit. We will unpack the various aspects of planning from a high level of data, including, comparative data between units, revenue constraints and mitigation, circuit breaker planning, cash management, and policy approaches. Then, we will dive into individual fund planning. For instance, debt planning, shared expenses concepts, interfund relationships, rate neutrality. Ultimately, the goal is to provide units with the tools they need to remain proactive instead of reactive, within the financial structure entrusted to them, unit wide.

### **Speakers:**

**Eric Reedy**, CPA, Managing Partner, Reedy Financial Group, P.C.

**Branden Robbins**, CPA, Partner, Reedy Financial Group, P.C.

1:45 p.m. – 2:00 p.m.	Break
2:00 p.m. – 2:45 p.m.	Opening Business Session
2:45 p.m. – 3:00 p.m.	Exhibit Hall Break
3:00 p.m. – 4:00 p.m.	Workshops

### **Measuring and Managing Carbon Emissions with Help from IU**

In 2019, 14 local governments in Indiana completed an inventory of carbon emissions released by their communities. In 2020, 11 cities and towns are working on action plans to reduce those emissions. Both accomplishments were guided by Indiana

University's Environmental Resilience Institute through a low-cost program offered in partnership with Sustain IU's sustainability externship program, which places IU students with local governments, among other entities, to support green efforts. The inventory process and results supply local governments with baseline information on a community's carbon sources. The data can be used by community leaders to identify opportunities for governmental action and partnerships to achieve emissions reduction targets. The information can also be used to understand where there are opportunities for energy efficiency, saving taxpayer money, and more. Attend this session to learn how you can join cities like Elkhart, Carmel, Fort Wayne, Gary, Evansville, Zionsville, and others to go through the Resilience Cohort.

**Speakers:**

**Steven Chybowski**, Outreach Coordinator, Forest Alliance

**Carolyn Townsend**, Environmental Resilience Extern, Evansville

**Andrea Webster**, Implementation Manager, Environmental Resilience Institute, Indiana University

**Timothy Weir**, Administrator, Commission on Homelessness for Evansville and Vanderburgh County, Evansville

**Medicare Education for Municipal Employees**

Do you often receive questions from employees about Medicare? This workshop can help! It will also inform individuals who are nearing 65 themselves on the basics of Medicare and the steps they need to take and when. Expert panelist will provide an insight on this complicated topic so that people may feel better prepared as they approach Medicare eligibility. It will help people avoid penalties and make sure they do not miss their window to enroll. Help your employees, or even yourself, gain confidence in your knowledge of the next steps and how to be prepared to make great decisions.

**Speaker:**

**Maria Pearson**, Certified Medicare Advisors, Henriott Group, Inc.

**TIF as an Economic Development Tool and Clawbacks to Protect Your Community (CLE Pending)**

TIF is a useful, complex economic growth and development tool. Whether you've worked with TIF districts for years or you're just getting started, this workshop is for you. Panelist will cover the best practices for the uses of TIF, pitfalls to avoid in uses of TIF, various clawbacks that can be utilized to manage incentive risks and any recent legislative changes regarding TIF.

**Speakers:**

**Lisa Lee**, Partner, Ice Miller

**Jason Semler**, Partner, Baker Tilly Municipal Advisors, LLC

**Utilizing Indiana's Build-Operate-Transfer Statute (CLE Pending)**

In recent years, the use of IC 5-23 (BOT Statute) has started to grow in popularity among governmental units across the state, but many still don't understand the process, benefits or risks associated with this delivery method. This panel presentation will cover the legal and practical aspects of the BOT delivery method and show project examples and success stories from the use of this procurement statute. Attendees will know and understand the steps they need to take to use this project delivery method as well as the challenges and advantages associated with it.

**Speakers:**

**Tim Jensen**, PE, President & CEO, Veridus Group, Inc.

**Greg Martz**, Partner, GM Development

**Jerimi Ullom**, Attorney, Hall Render Killian Heath & Lyman

4:00 p.m. – 4:15 p.m.

Break

4:15 p.m. – 5:15 p.m.

Municipal Trivia/Expert Roundtables

- Municipal Trivia – Aim
- Expert Roundtable – Optimizing Your Community's Financial Resources – Krohn & Associates
- Expert Roundtable – Tax Anticipation Warrants – Indiana Bond Bank

## Wednesday, October 7

10:00 a.m. – 4:00 p.m. Exhibit Hall Open

10:00 a.m. – 11:00 a.m. Workshops

### **Impact of COVID-19 on Employment Practices and Laws *(CLE Pending)***

We are in the middle of a pandemic which has drastically altered many long-established laws and policies governing how workplaces operate. Whether it is claims of discrimination, how government conducts open meetings, or how plaintiff's employment lawyers will argue under the ADA and FLMA that personal attendance in the office isn't needed because the pandemic has shown how employers have allowed remote working. This workshop will be a comprehensive "debriefing" on the pandemic's effect on local government employment practices.

#### **Speaker:**

**Tony Overholt**, Partner, Frost Brown Todd

### **Resetting Your Utility Operations in the New Normal**

This workshop is part of Baker Tilly Municipal Advisors' COVID-19 reopen, recovery, reset series for municipalities. The uncertainty brought about by the pandemic presents the opportunity to apply lessons learned. As utilities look ahead, processes and procedures will be redefined, adaptive capabilities will be reassessed, and response recovery plans will be put into place for future potential incidents. Part of this reset period includes developing a multi-faceted, coordinated financial plan that both protects and adds value to the business. In Columbus, Indiana, Columbus City Utilities is working with Baker Tilly to implement a staffing study to appropriately adjust staffing levels to provide the highest quality water and wastewater service to customers. The utility company planned to enter into significant capital campaigns to support this initiative, which would be financed by various methods, including bond anticipation notes

(BANs), open market bonds and state revolving fund (SRF) bonds. The water utility is regulated, which creates additional complexities, and now this project needs to be reassessed through a COVID-19 lens. A panel of experts will discuss key lessons learned from the pandemic on how to operate a utility business efficiently post-COVID-19.

**Speakers:**

**Doug Baldessari**, CPA, Partner, Baker Tilly Municipal Advisors

**Scott Dompke**, Executive Director, Columbus City Utilities

**Strategic Funding and Trail Designs Create Economic Development “Anchor” for Town of Burns Harbor**

This workshop will offer an overview of the Town of Burns Harbor’s 2.5-mile segment of the Marquette Greenway Trail – a critical east-west link within a 50-mile regional trail system that links communities, major parks and a variety of cultural, natural and economic assets. This presentation will walk through the design and funding opportunities his team capitalized on to build this segment of the Marquette Greenway Trail into an anchor and driver of economic development for the Town. In addition, the workshop will explore how the project team’s trail design and funding expertise has empowered the Town’s transition from its perception as a “steel town” to an environmentally sensitive community with boundless recreational opportunities. Participants will learn how this effort led to even more development and advancement for the town.

**Speakers:**

**Eric Hull**, Council Member and Redevelopment Commission President, Burns Harbor

**Mike Micha**, Partner & Vice President of Development, Holladay Properties

**Glenn Peterson**, Project Engineer, SEH of Indiana, LLC

**Vendor Solutions Workshop: Youth Sports – A Home Run for Economic Development**

Cities and towns that offer sports and recreation assets promote a healthier lifestyle and create destinations for families and visitors. Implementing these facilities is key to attracting and retaining workforce, importing income from outside of the community, and spurring other development in the area. This presentation will present four case studies that serve as an example of the powerful, game-changing impact a state-of-the-art recreational facility can bring to a community and a region. (1) Hammond Sportsplex; (2) Kokomo Baseball Stadium; (3) Loeb Stadium; and (4) Merrillville Recreation – These real-life examples will offer participants some real takeaways for their own exciting projects.

**Speakers:**

**Brandon Hoopingarner**, Design Director, American Structurepoint, Inc.

**Dan McCloskey**, Senior Architect, American Structurepoint, Inc.

**Phil Taillon**, Chief of Staff, Hammond

11:00 a.m. – 11:15 a.m. Break

11:15 a.m. – 12:15 p.m. Workshops

**Indiana’s Aging Infrastructure– Challenges and Solutions for Municipalities, Utilities, and Homeowners**

Indiana’s aging water and sewer infrastructure is a growing problem for municipalities, utilities, and the homeowners they serve. This workshop will address the issues and pose solutions that can help recover lost revenue, improve public and private infrastructure, educate, and protect homeowners, and assist disadvantaged citizens in your community.

**Speakers:**

**Mike Chambers**, Regional Accounts Director, HomeServe USA

**Allie Terrell**, Sales Representative, HomeServe USA

**Is your Cyber Insurance Policy Claim Going to be Paid? *(CLE Pending)***

If you perform any online functions, your municipality has probably purchased a cybersecurity insurance policy. If you are hacked in the office or when employees are working from home, are you covered? Did you know that policy holders have filed lawsuits over the meaning of policy language and that this area of insurance is constantly evolving? Join this workshop to answer these questions and learn how to read your policy to ensure you have the best possible coverage for your community!

**Speaker:**

**Cam Starnes**, Attorney, Taft Law

**Online Public Engagement**

As the global coronavirus pandemic reached the United States and communities began to shut down, Americans rushed to acquaint themselves with various new and existing web-based communications tools. As the virus lingers and life as we knew it still eludes us, the work of municipal government must continue. How we engage our citizens, and vice versa, in this challenging time is paramount. Even though convening in person is difficult, finding ways to connect residents with their local government cannot become a backburner issue. This workshop will explore engagement expectations and digital engagement in a COVID-19 and post-COVID-19 universe.

**Speakers:**

**Terry Amsler**, Adjunct Lecturer, Paul H. O'Neill School of Public and Environmental Affairs, Indiana University

**Lisa Blomgren Amsler, JD**, Distinguished Professor, Paul H. O'Neill School of Public and Environmental Affairs, Indiana University

**Matt Leighninger**, Vice President for Public Engagement, Public Agenda

**Utilizing Higher Education as an Economic Development Tool**

Community colleges and smaller private higher educational institutions faced enrollment challenges as employers faced worker shortages and specific skills needs. This created an opportunity for Plainfield to capitalize on what many deemed an

issue. MADE @ Plainfield represents a new approach in thinking, collaborating, and learning among various higher educational institutions and the Town of Plainfield. The project is the result of years of planning by leaders from several educational institutions, as well as business and community leaders. Expected to open in the 2021–2022 academic year, MADE represents the future of non–traditional learning while creating a unique opportunity for young adults, mid–adults, and older adults. Of course, all of this has come with its advantages and surprises...log on to learn more!

**Speakers:**

**Andrew Klinger**, Town Manager, Plainfield

**Brandy Perrill**, Executive Director, Hendricks College Network

**David Rainey**, Project Executive, Veridus Group, Inc.

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| 12:15 p.m. – 1:00 p.m. | Lunch Break  |
| 1:00 p.m. – 2:30 p.m.  | Aim Awards Program, Presented by Baker Tilly Municipal Advisors, LLC |
| 2:30 p.m. – 2:45 p.m.  | Exhibit Hall Break   |
| 2:45 p.m. – 3:45 p.m.  | Workshops  |

**ADA in the Time of COVID–19: Ensuring Accessibility for All Amidst the Pandemic** *(CLE Pending)*

South Bend has been involved in numerous COVID–19 challenges, such as assisting the homeless population during the pandemic, use of City Park facilities for COVID–19 testing sites, Army Corps of Engineer inspection of the convention center as a secondary COVID–19 treatment site, and many others. Our presenter will speak on these experiences and how we ensure accessibility to all people, especially those with disabilities, during this time. Some topics include accessible online resources, location (such as a testing site) accessibility, and ensuring access to information for all. Attendees from all communities will relate to these scenarios and benefit from the lessons learned.

**Speaker:**

**Aladean DeRose**, City Attorney and ADA/Title VI Coordinator,  
South Bend

**Post Pandemic Recovery: Economic Development in the New Normal**

This workshop is part of Baker Tilly Municipal Advisors' COVID-19 reopen, recovery, reset series for municipalities. The economic impact of the COVID-19 pandemic will necessitate a change in how Indiana communities' approach economic development. Municipal leaders will need to evaluate several areas as they consider post-pandemic economic development strategies, including local and global supply chains, regional collaboration, the capital available to support private development initiatives and the role local governments play in economic development projects. This session will address these issues and provide insight on how communities can formulate economic development strategies for the new economic reality. How can we help our local business community recover to regain economic vitality? How do we continue to strive for economic development in this environment? What impact has this had on our TIF districts? Expert panelists will answer these questions and much more.

**Speakers:**

**Matt Eckerle**, CIPMA, Partner, Baker Tilly Municipal Advisors, LLC  
**Mindy Kenworthy**, President & CEO, East Central Indiana Regional Partnership

**Jolena Presti**, Managing Director, Baker Tilly Capital

**Water Loss Audits: Lessons Learned**

Hoosier water utilities must have their annual water loss audits completed, validated, and submitted to the Indiana Finance Authority by January 1, 2021. Beyond that date, water audits must be conducted annually, with validation done every even-

numbered year by a third-party certified validator or certified utility staff member. This one-hour discussion will cover managing audits, handling validations and the lessons learned over the past several months that session attendees can take home and benefit from as they work through this new process. Workshop attendees will hear a broad and deep perspective from an experienced engineer well-versed in the highs and lows and everything in between of this required initiative. This session also will include time for Q/A with attendees. With validated water loss audits due in less than three short months after the Aim Ideas Summit, can you afford to miss this session?

**Speaker:**

**Andrew Gordon, P.E., C.F.M.,** Project Manager, Wessler Engineering

**Vendor Solutions Workshop: Public Sector – The Market, the Challenges, the Strategies**

This will be a discussion of how the insurance supply chain is reacting to the current national pandemic environment, the changing demographics in the workforce, and relevant strategies tied to cost savings as well as employee recruitment and retention.

**Speaker:**

**Steven Vermette,** Senior Large Employer Specialist, National Public Sector Partner, Colonial Life

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| 3:45 p.m. – 4:00 p.m. | Policy Platform Hearing  |
| 4:00 p.m. – 4:15 p.m. | Break  |
| 4:15 p.m. – 5:15 p.m. | Presidents’ Reception Cocktail Hour  |
| 5:15 p.m. – 6:15 p.m. | Municipal Trivia / Expert Roundtables <ul style="list-style-type: none"><li>➤ Municipal Trivia #2 – Aim</li><li>➤ Expert Roundtable – Public Records Act / Open Door Law – Bose McKinney &amp; Evans LLP</li></ul> |

- Expert Roundtable – Tax Increment Financing – Reedy Finance Group

## **Thursday, October 8**

10:00 a.m. – 11:00 a.m. Workshops

### **ADA Website Compliance – It’s a Must!**

The pandemic has encouraged more and more electronic communication techniques to be employed in business and in government. Municipal websites are used to communicate status of events, payment of utility bills, scheduling appointments for government services and more. The ADA covers a great many of your sheltered citizens and applies to your website, but is it in compliance and can the website be used by all of your citizens?

#### **Speakers:**

**Ken Barlow**, Chief Solutions Officer, eGov Strategies LLC

**Brian Fisher**, eGov Strategies LLC

**Glenn Harbin**, Website Accessibility Consultant

**Scott Lage**, Attorney & Vice President of Claims, Bliss McKnight, Inc.

**John McKnight**, President, Bliss McKnight Inc.

### **Cultivating Youth Civic Engagement**

Engaging youth in municipal government can have extraordinary benefits for an entire community. Not only will they learn more about how a city or town operates, they become more invested in their hometown and more likely to be productive advocates now and into the future. Panelists will discuss existing municipal youth councils, establishing a new council, and offer some dos and don’ts to consider along the way. This will be an excellent time to ask questions and determine if a youth council is right for your community.

#### **Speakers:**

**SuzAnne Handshoe**, Mayor, Kendallville

**Denny Spinner**, Mayor, Huntingburg

**Dave Wood, Mayor, Mishawaka**

**Mitigating Fraud in an Optimal Economic Development Environment for Deception and Desperation *(CLE Pending)***

Municipalities stand vulnerable to external and internal fraud and to embezzlement threats in the current economic downturn. Procurement fraud also is expected to escalate as people find themselves in desperate times. Expert panelists will discuss how to prevent and what to do if you're a victim of fraud. Also panned are discussion on vulnerabilities, fraud trends, quid pro quos, conflicts of interest and much more!

**Speakers:**

**E. Timothy DeLaney, Attorney, Bose McKinney & Evans LLP**

**J. Douglas Kouns, Owner, Veracity**

**Town of Dyer and America in Bloom – A Winning Combination**

Dyer in Bloom is dedicated not only to the beautification of Dyer, but also the enhancement of economic development. Dyer began its journey in 2015 with a CN Railroad grant. With the continued support of America in Bloom, the town has a great membership and has identified and completed numerous projects. America in Bloom facilitated the initial grant and the town has welcomed their judges each year to guide them through additional phases of their beautification efforts. Participants will learn about America in Bloom, as well as some of the beautification best practices that improve the quality of life in Dyer and in communities all around the country.

**Speakers:**

**Mike O’Shea, Parks and Recreation Director, Dyer**

**Pat Rosenwinkle, Dyer in Bloom Member**

**Mary Tanis, Council Member, Dyer**

10:00 a.m. – 11:15 a.m. Exhibit Hall Final Hours

11:05 a.m. Exhibit Hall Grand Prize Giveaway

11:15 a.m. – 12:30 p.m. Closing Business Session