



Agenda
March 15–18, 2021
Virtual Event

Monday, March 15

9:00 a.m. – 10:00 a.m. Institute & Academy Class – Census: What Happens After the Count?

Every ten years in America a census of the population is taken by the federal government. While the monumental task of taking the count is what makes the most headlines, there is so much data and so many actions resulting from the U.S. Census. This course will discuss what data is gleaned, how to find it, and how municipalities are impacted by the Census. Further, participants will leave with an understanding of any actions that can be or must be taken as a result.

Speaker:

Carol Rogers, Co-Director, Indiana Business Research Center & Governor's Liaison to U.S. Census Bureau

10:00 a.m. – 12:00 p.m. **Institute & Academy Class – Understanding Grassroots Legislative Advocacy and Real-Time Updates from the 2021 Legislative Session**

Due to the ongoing pandemic, things at the Indiana Statehouse are operating unusually. However, bills are still being considered and moved through the General Assembly, including the state's biennium budget. This workshop will discuss legislation being considered, how it impacts cities and towns, and what you can do to make a difference. We'll also take a deep dive into how the state's budget impacts municipal budgets, giving participants a greater understanding of how revenues are collected, calculated for distribution and transferred to local units.

Speakers:

Matt Greller, Chief Executive Officer, Aim

Jenna Knepper, Government Affairs Manager, Aim

Lindsey Moss, Chief Government Affairs Officer & Legislative Counsel, Aim

Campbell Ricci, Policy Director, Aim

12:00 p.m. – 1:00 p.m. **Lunch Break**

1:00 p.m. – 3:00 p.m. **Institute & Academy Class – Understanding and Responding to Implicit Bias and Micro Aggressions**

Science has helped us understand we are all biased and the difference is not between good and bad, but in how aware we are of our potential biases and how skilled we

are at the strategies we can mobilize to reduce the impact of those biases. Positive outcomes from this workshop are understanding the concepts of implicit bias and micro-aggressions, recognizing situations and contexts where they are more likely to occur, identifying strategies to reduce implicit bias, and practical solutions to move toward recovery and repair when they do occur.

Speaker:

Melinda Messineo, PhD, Professor of Sociology, Ball State University (*Shafer Leadership Academy Presentation*)

3:00 p.m. – 4:00 p.m. **Institute & Academy Class – Working with DWD on Municipal Unemployment Insurance Accounts**

As an employer working with the Department of Workforce Development, you are often focused on when your reports are due and what happens when you don't file them on time. But sometimes there is so much more to the story! This workshop will cover the lifecycle of an unemployment insurance account and the best practices for maintaining your account. This course will result in more accurate, timely reporting and a better understanding for what the agency expects of its account holders.

Speakers:

Jennifer Chappell, Director of UI Tax Administration and Trust Fund Accounting, Indiana Department of Workforce Development
Doug Owens, Assistant Director of UI Tax Administration and Trust Fund Accounting, Indiana Department of Workforce Development

4:00 p.m. – 5:00 p.m. **Institute & Academy Class – Collecting and Accounting for Unpaid Bills**

Before an unpaid utility bill goes deep into arrears, there is a lot of groundwork laid to work with customers on a cure. The same can be said for ordinance violators. What happens when your efforts fail and ratepayers and violators do not pay what's due? There are some options for collecting these debts, even though the options are more limited due to recently passed legislation. Attendees will also hear from the State Board of Accounts on how to account for and write off these bad debts.

Speakers:

Todd Caldwell, Director of Audit Services, State Board of Accounts

Susan Gordon, CPA, Director of Audit Services, State Board of Accounts

Jeff Rowe, Partner, Baker Tilly Municipal Advisors, LLC

Tuesday, March 16

9:00 a.m. – 10:00 a.m. **Institute & Academy Class – Understanding Taxable Benefits from both a Payroll and Policy Perspective**

Knowing how to handle taxable benefits for processing payroll and answering employee questions is critical for municipal clerks who wear many hats. There are many obvious taxable benefits, like municipally provided cell phones and uniforms. However, what about adoption assistance and even employer health insurance contributions? Understanding how these benefits are treated in tax policy is crucial. Understanding that these benefits can be used to attract quality workforce is

equally beneficial. This course will offer both education and advanced perspective on taxable benefits that will serve your community with greater compliance and more effective service delivery.

Speakers:

Nelia Klawitter, Government Entity Specialist, Internal Revenue Service

Lori Stieber, Government Entity Specialist, Internal Revenue Service

10:00 a.m. – 11:00 a.m. Institute & Academy Class – Ensuring Government Spaces are Secured for your Workforce and the Public

Unfortunately, maintaining a safe workplace continues to evolve well beyond the safety concerns of using dangerous equipment or heavy lifting. Keeping your municipal employees and visitors to our buildings safe means contemplating the unthinkable, from gun violence, explosive devices, and extreme civil unrest. Experts in preparedness and response will be on-hand to instruct participants on the must-do, evolving, world of establishing safe spaces, providing a sense of peace and confidence for all involved.

Speakers:

Charles Kulp, Assistant Chief, Walkerton

Matthew Schalliol, Police Chief, Walkerton

Sgt. Tony Slocum, Indiana State Police, Peru Post

11:00 a.m. – 12:00 p.m. Institute & Academy Class – Navigating 2022 and Beyond: How the Pandemic has Changed Municipal Financial Planning

It's often said to "never neglect an opportunity for improvement." While many Indiana cities practice proactive financial planning, the Covid-19 Pandemic has put forth financial hurdles not faced before and the consequences will likely be felt for years by local municipalities. In this workshop we will walk through a case study where a city took their historical financial roadmap and improved it; taking into account expected and potential financial impacts from the Pandemic. The workshop will address financial planning for projects, staff succession and debt utilization during a pandemic.

Speakers:

Susan Cowen, Manager, Baker Tilly Municipal Advisors, LLC

Paige Sansone, Partner, Baker Tilly Municipal Advisors, LLC

Brandon Scruggs, Senior Consultant, Baker Tilly Municipal Advisors, LLC

12:00 p.m. – 1:00 p.m. **Lunch Break**

1:00 p.m. – 2:00 p.m. **Institute & Academy Class – Grant Availability and Management**

With steady streams of revenue sometimes unstable or restrained by constitutional limits, municipal leaders sometimes search for new revenues in the form of grants. It's rarely as easy as it sounds to find them, let alone win them, and manage them. Learn how and where to identify what grants are available and right for your community. Attendees will also gain valuable knowledge about the right ways to manage grant funds to ensure maximum utilization and sound practices.

Speakers:

Eric Ogle, CBDG Program Director, Office of Community and Rural Affairs

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

2:00 p.m. – 5:00 p.m. **Institute & Academy Class – APT Cash Handling / Internal Controls**

Whether we are clerks or clerk-treasurers, how we handle public funds is equal to the level of the public's trust we are given. This workshop will provide best practices and procedures to manage risk while handling and processing cash. In addition to cash handling, banking industry standards for credit card transactions and other electronic transfers, and the review of security and loss prevention procedures, all will be discussed in this comprehensive three-hour course. Come ready to learn and take away new abilities in this area of municipal finance!

Speaker:

Michael Pettigrew, President, Public Treasurers of the United States and Canada (APT US&C)

Wednesday, March 17

9:00 a.m. – 10:00 a.m. **Institute & Academy Class – Cyber Security Insurance and Precautionary Steps**

Cyber security insurance is an effective way to reduce cyber intrusions because it promotes and sometimes requires the adoption of risk management measures, such as the use of best practices as a means for limiting losses incurred from a cyber attack. Participants will learn about the most common kinds of local

government attacks, what kinds of policies and coverages are available, and what important financial and practical issues to consider when engaging in this complicated yet necessary world.

Speakers:

Russell Burrows, Chief Information Security Officer,
Innovative Rural Networking Solutions

Frank Pinson, Vice President – Sales, Bliss McKnight, Inc.

10:00 a.m. – 11:00 a.m. **Institute & Academy Class – Hosting Virtual Meetings**

To allow for continuity of government during the ongoing pandemic, Governor Holcomb has allowed through a series of executive orders, virtual public meetings, and hearings. This workshop will discuss a virtual meeting from start to finish, from the advertising and logistics, to the creativity some communities have used to ensure maximum citizen and media engagement. Join this workshop to become well-versed on your digital meeting options and gain status updates regarding how virtual meetings might continue to be an option even after the coronavirus pandemic is behind us.

Speakers:

Karen Arland, Attorney, Kennedy, Downs & Arland, P.C.

Susan Dillman, Clerk–Treasurer, Centerville

11:00 a.m. – 12:00 p.m. **Institute & Academy Class – Peer Led Learning Opportunity**

Professional development comes in many forms. Some learn by reading. Some learn by writing. Others need a combination of the two, or something completely

different. One thing we all have in common, however, is that we always learn when we ask questions and exchange information with one another. Whether you are a second-year clerk, or a 15-year clerk-treasurer, bring your questions and we'll make sure you get the answers you need to feel confident, skilled, and ready to meet the challenges ahead.

Speakers:

Jenny Banks, Director of Communication, Indiana Department of Local Government Finance

Wes Bennett, Commissioner, Indiana Department of Local Government Finance

Moderator:

Carrie Mugford, Clerk-Treasurer, North Manchester

Panel:

Robert Ferguson, Clerk-Treasurer, Roann

Kayla Pauley, Clerk-Treasurer, Cromwell

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

Deb Twitchell, Clerk-Treasurer, Angola

12:00 p.m. - 1:00 p.m. **Lunch Break**

1:00 p.m. - 3:00 p.m. **Institute Class - The Responsibilities and Authority of Clerks and Clerk-Treasurers**

There are a series of questions you need answered before you can graduate to the next level of municipal administration. Are your duties defined? Are there limitations you need to be aware of? Is there a clear delineation between the duties of the mayor and those of the clerk? How can you keep track of when various reports and filings are due? Getting the answers to

these and other vital questions are the building blocks for molding your role as an elected leader and will establish your authority among your employees and constituents.

Moderator:

Kristie Bone, Clerk–Treasurer, LaGro

Panel:

Karen Arland, Attorney, Kennedy, Downs & Arland, P.C.

Nicole Bolden, City Clerk, Bloomington

1:00 p.m. – 2:00 p.m. **Academy Class – Capital Assets**

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 sometimes-complicated form of government accounting and correct any misunderstandings of the past. Attendees should come ready with questions and be eager to drill down!

**Note: This kind of drill is not a capital asset.*

Speakers:

Dan Hedden, Partner, Baker Tilly Municipal Advisors, LLC

Jon Peterson, President, Peterson Consulting Services, Inc.

Kevin Watson, Senior Manager, Baker Tilly Municipal Advisors, LLC

2:00 p.m. – 3:00 p.m. **Academy Class – Using Time Management and Organizational Skills as a Stress Relief Strategy**

Throughout our lives we learn strategies to cope with stress. Public life, however, can add new layers of pressure that few others can relate to. This workshop will help you deal with the stress of being a municipal leader and offer new concepts, strategies, and skills that will help you succeed as your responsibilities and years of service increase. Attendees will learn advanced time management, organization, goal setting, project completion, email management, delegation strategies, and more – all aimed at helping you become a more effective and seasoned leader.

Speaker:

Erin Jamison-Koenig, Communications Director, Aim

3:00 p.m. – 5:00 p.m. **Institute & Academy Class – ILMCT Institute & Academy Presents ALL THE QUEEN’S HORSES**
Sponsored by LWG CPAs & Advisors

ALL THE QUEEN’S HORSES tells the story of Rita Crundwell, the perpetrator of the largest case of municipal fraud in American history. As city comptroller of Dixon, IL (population 15,838), Crundwell stole \$53 million dollars of public funds across 20 years. She used the funds to build one of the nation’s leading quarter horse breeding empires, all while forcing staff cuts, police budget slashing, and neglect of public infrastructure. ALL THE QUEEN’S HORSES investigates her crime, her lavish lifestyle, and the small town she left in her wake.

Moderator:

Jim Higgins, Partner, LWG CPAs & Advisors

Thursday, March 18

9:00 a.m. – 11:00 a.m. **Institute Class – What Holds Things Together? Nuts and Bolts**

There are certain functions of running a municipal government that collectively hold it all together to ensure everything works properly for the citizens you serve. Payroll, benefits, compensatory time, salary ordinances, payroll taxes, and 1099's for contractors are just some of the nuts and bolts that every administrator needs to master. Therefore, it's appropriate that this class is taught by a list of true masters in municipal government and municipal auditing.

Speakers:

Todd Caldwell, Director of Audit Services, State Board of Accounts

Susan Gordon, CPA, Director of Audit Services, State Board of Accounts

Karen Heim, Clerk–Treasurer, Culver

Tami Runyon, Clerk–Treasurer, Bluffton

9:00 a.m. – 10:00 a.m. **Academy Class – Appropriations: Ensuring a Transparent and Compliant Process**

The city or town budget identifies spending priorities – but how does the fiscal officer use this guiding document as a method for directing funds to the appropriate place? What kinds of supporting documentation is required to ensure appropriations are

being made in accordance with state requirements and best accounting practices? Finally, how can you work cooperatively with your council to ensure a smooth, efficient, and transparent process for approving and executing appropriations.

Speakers:

Michael Griffin, Clerk-Treasurer, Highland

Jerry Hickman, Partner, Reedy Financial Group, Inc.

Katelyn Shafer, Manager, Reedy Financial Group, Inc.

10:00 a.m. – 11:00 a.m. Academy Class – Personal Development through Purposeful Networking

A well-rounded professional career means building a solid network. This network can help you succeed both personally and professionally. Whether groups be at the local, state, national or international level, expanding beyond your inner circle can make you a more confident leader and offer you perspectives and best practices beyond what you can develop on your own. Attendees of this workshop will share their experiences and status as community and organizational leaders to help you identify your next steps towards a more comprehensive web of support.

Speakers:

Vicki Kitchen, Clerk-Treasurer, North Liberty

Brenda Young, Clerk-Treasurer, Nashville

11:00 a.m. – 12:00 p.m. Institute Class – Tax Increment Financing from the Beginning

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. This course will offer the critical information you need to know about establishment, maintenance, and reporting, of TIF districts to ensure your community is able to maximize this valuable economic incentive and quality of place tool.

Speakers:

Heidi Amspaugh, Director, Baker Tilly Municipal Advisors, LLC

Tom Pitman, Attorney, Barnes & Thornburg LLP

11:00 a.m. – 12:00 p.m. Academy Class – Codification and the Proper Ways to Communicate your City or Town’s Official Actions

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 and how to follow up and memorialize these actions.

Speakers:

Chou-il Lee, Attorney, Taft Law

Joseph McDonough, Codification Consultant, American Legal Publishing Corporation

12:00 p.m. – 1:00 p.m. Lunch Break

1:00 p.m. – 3:00 p.m. **Institute & Academy Class – Public Records Management & Retention**

Before you can address how to store, maintain, and preserve public records, you must know how to identify a public record and be a compliant steward of history. Don't let your questions go unanswered. This workshop will provide meaningful answers and give you the detailed training you've been looking for.

Speakers:

Luke Britt, Public Access Counselor, State of Indiana

Amy Christiansen Janicki, Records Management Liaison, Indiana Archives and Records Administration

Jeanine Xaver, Clerk-Treasurer, Plymouth

3:00 p.m. – 5:00 p.m. **Institute Class – Human Resources Files and Records Management**

Are you overwhelmed with an antiquated or inadequate filing system? Does your city or town have trouble keeping its HR or personnel files up-to-date and accessible? Attend this session to learn successful records management – how to create a filing system, update files in a timely manner, and ensure they remain accessible. Take your complicated HR and personnel files and turn them into an orderly management resource!

Speaker:

Kristen Deutsch, President, New Focus HR, LLC

3:00 p.m. – 4:00 p.m. **Academy Class – Preparing for and Facing Federal Grant Auditing**

You have identified the grant opportunities, secured the grants, and received the funding. But how do you ensure you're expending the money properly? How do you guarantee your community is above reproach and meeting Federal guidelines for managing and reporting after-the-fact? Finally, how can you prepare for the scrutiny, auditing and reporting that accompanies most major grants? The experts at the Indiana State Board of Accounts will provide answers to these questions and more to help mitigate any potential financial loss or regulatory complications that can result from poor grants management.

Speakers:

Vicki Kitchen, Clerk-Treasurer, North Liberty

Amber Platt, CPA, Federal Audit Coordinator / Director of University Audits, State Board of Accounts

4:00 p.m. – 5:00 p.m. **Academy Class – PERF: Understanding Your Plan**

It is never too early to learn about your retirement plan. Join INPRS for our Understanding Your Plan presentation. Get to know the basics of both the MyChoice and Hybrid retirement plans. Make the most of your benefit with information on investment choices and resources, along with specifics on retirement eligibility and payout options.

Speaker:

Jennifer Lowery, Client Services Consultant, Indiana Public Retirement Systems