



Agenda
March 19–23, 2023
Horizon Convention Center
Muncie, Indiana

Sunday, March 19

2:00 p.m. – 6:00 p.m.

Registration
Main Lobby

3:00 p.m. – 4:00 p.m.

Welcome & Opening Session
Delaware 1

Attend this important kick-off session to learn what to expect at the conference and have a little fun before the hard work begins. Valuable information about the week and about the professional certifications available to ILMCT members will be shared. You won't want to miss this foundation-setting session!

Speakers:

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale

Dan Ridenour, Mayor, Muncie

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

4:00 p.m. – 5:00 p.m.

Institute & Academy Class – The Latest on ARPA Projects and Compliance

Delaware 1

The American Rescue Plan Act presents cities and towns a rare opportunity to address critical needs that once seemed out of reach. Join this workshop to learn what some communities are planning for these vital funds and the emerging best practices for managing and administering these dollars. Panelists will discuss compliance with all regulations that come along with utilization of federal funds and how to ensure your citizens are both proud of your municipalities accomplishments and stewardship of public funds.

Speakers:

Chris Brunner, Senior Consultant, Baker Tilly Municipal Advisors, LLC

Greg Wright, City Controller, Greenwood

5:00 p.m. – 6:00 p.m.

Institute & Academy Class – Using the Indiana Association of Regional Councils to Help with Your Regional Planning

Delaware 1

If you aren't familiar with regional councils, you aren't alone. Those communities who have worked with their council, however, can tell you the benefits and expertise they offer. Their abilities in the areas of strategic economic development initiatives and grants for a whole range of community projects can supplement your city or towns resources, giving you access to additional funding options. This workshop will review the regional council system and take a deep dive into

the specific ways they provide value and allow municipal officials to demonstrate effective leadership to their citizenry.

Speaker:

Brian Long, Executive Director, Indiana Association of Regional Councils

6:30 p.m.

Pizza at Courtyard
Conference Room AB

Monday, March 20

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m.

Registration
Main Lobby

7:30 a.m. – 8:00 a.m.

Breakfast
Interurban Hall

8:00 a.m. – 4:00 p.m.

State Board of Accounts Resource Center
Main Lobby

8:00 a.m. – 9:00 a.m.

Institute Class – Are You Handling Surety Bonds Correctly?
Delaware 1

Surety Bonds are necessary for most fiscal officer positions. Join us as we review the statutory requirements and verify you have the correct bonds, for the correct people, and they are filed in the correct places. We will also learn what happens during an investigation and if the charge amount is over the bonded amount.

Speakers:

Carrie Mugford, Clerk–Treasurer, North Manchester

Kayla Pauley, Clerk–Treasurer, Cromwell

Ed Wheele, Special Investigations Director, Indiana State Board of Accounts

8:00 a.m. – 9:00 a.m.

Academy Class – Working Ahead: Preparing for the Aftermath of Natural Disasters

Delaware 2

When naturally occurring emergencies arise, there can be little to zero notice. While you may not know *when* a disaster will strike, there is much you can do to prepare for the fiscal and administrative aftermath. Our experienced panel will run through the life cycle of a disaster and ensure you have all the right tools to help you make quick, accurate decisions that won't come back to haunt you or your community's wallet.

Speaker:

Mary C. Moran, CEM, Emergency Management & Preparedness Director, Indiana Department of Homeland Security

9:00 a.m. – 11:00 a.m.

Institute & Academy Class – Breaking Down the Many Aspects of Cyber Security

Delaware 1

The IN-ISAC, a division of the Indiana Office of Technology, will speak on cyber risks and threats facing local governments of all sizes. IOT recently completed a statewide tour of all 92 counties to meet with local government officials and learn about cybersecurity and technology challenges affecting counties, cities, K-12, and other governmental organizations. The IN-ISAC will share what they learned and their efforts to help local governments improve their cybersecurity capabilities. Obtaining and understanding Commercial Cyber Insurance has become increasingly more difficult over the past several years. During our presentation, MJ Insurance will also be on hand to provide insight and guidance into the complexities of obtaining and understanding Commercial Cyber Insurance. MJ will explore why insurance carriers are asking these questions, help breakdown some of the nuances of the questions, discuss

importance of internal collaboration with your IT team/partners, and discuss some of the emerging topics coming soon.

Speakers:

Adam Adler, Client Executive, MJ Insurance Company

Neil Heider, Risk Management Consultant, MJ Insurance Company

Carol Scully, Strategic Risk Management Director, MJ Insurance Company

Tad Stahl, Executive Director, IN-ISAC

11:00 a.m. – 12:15 p.m. **Luncheon – Certifications Discussion**

Interurban Hall

12:30 p.m. – 1:30 p.m. **Institute & Academy Class – Capital Assets with Accumulated Depreciation**

Delaware 1

There are many aspects of documenting your capital assets from depreciation to uploading the right information to the state's Gateway system. In this workshop, you will learn through the use of examples how to depreciate different assets over two years after appropriately setting up the schedule to track the many assets.

Speakers:

Michael Crowley, Government Technical Assistance & Compliance Director, Indiana State Board of Accounts

Mitch Wilson, Indiana State Board of Accounts

1:30 p.m. – 4:30 p.m. **Institute & Academy Class – Internal Controls**

Delaware 1

This three-hour Internal Controls Training is provided by the Association of Public Treasurers of the United States and Canada (APT US&C); ILMCT's national treasury association partner. The program will provide, in detail, what makes an

effective internal control system with the following training objectives: provide an understanding of management's responsibility in creating an environment to achieve strong internal controls procedures and practices; provide an understanding of employees' responsibility to comply with procedures and practices; offer insight to identify, assess and manage risks; provide support tools to establish, document, monitor, and adhere to internal controls procedures; and provide a roadmap to develop an effective internal control system to: protect the effectiveness and efficiency of operations; support the reliability of financial reporting; and ensure compliance with applicable laws and regulations

Speaker:

Michael Pettigrew, CTP, CPFA, ACPFIM, MiCPT; Treasurer, Ann Arbor; Board Director and Legislative Chair, Michigan Municipal Treasurers Association; Past President, Association of Public Treasurer's United States and Canada (APT US&C)

4:30 p.m. – 5:30 p.m.

Institute Class – Stop the Bleed

Delaware 1

Today's workplaces are not the workplaces of the past. Years ago the only red you saw were the red lines in your budget. Why is this? Some people commit violence because of revenge, robbery, or ideology – with or without a component of mental illness. While there is no way to predict an attack. How we prepare ourselves and not stay complacent will be the difference. We are coming out of a pandemic that has led to staff shortages and increased exposure to violent individuals than ever before. So, being prepared will make a difference. While most workplace violence will not end in physical traumatic injury. What you know and what you do may save a life or even your own. This class will give you the knowledge and direction to Stop the Bleed. Plus, give you some knowledge to start conversations with others about areas in other locations to be prepared for these types of emergencies: employee training and creating an emergency

action plan; how much and how soon and when; and what to do when it's over.

Speaker:

Jeff Koon, EMS Director, Culver

4:30 p.m. – 5:30 p.m.

Academy Class – Modernizing by Digitizing

Delaware 2

While the phrase “work smarter, not harder” may not sit well with some, the idea to create more efficient and streamlined processes has been around for centuries. Today, local governments don’t have to reinvent the wheel and can look to apps, methods, and “hacks” to digitize items that have been traditionally paper-based, automate processes when appropriate, and serve citizens more effectively. This workshop will cover digital and fillable forms, automatic payments and payroll, citizen reporting apps, and more!

Moderator:

Erin Jamison-Koenig, Communications Director, Aim

Speakers:

James Haley, Chief Information Officer, Fort Wayne

Greg Overtoom, Assistant Director for Enterprise Applications, Bloomington

7:00 p.m. – 9:00 p.m.

Networking Reception

Sponsored by Boyce Systems

1925 PubHouse Courtyard*

625 High Street

Muncie, IN 47305

Enjoy light appetizers, drinks, and prizes

**Located in the Courtyard*

Tuesday, March 21

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m. **Registration**
Main Lobby

7:30 a.m. – 8:00 a.m. **Breakfast**
Interurban Hall

8:00 a.m. – 9:00 a.m. **Institute Class – From Preparation to Performance: A
Presentation About Presentations**
Delaware 1

As a municipal official, you are often called upon to do public speaking and presentations for various audiences. Fiscal officers commonly do more presenting than most public servants, yet not everyone feels comfortable preparing materials and maintaining composure in the spotlight. Workshop attendees will gain valuable presentation skills to ensure they are prepared to convey information in the best manner possible.

Speaker:

Erin Jamison-Koenig, Communications Director, Aim

8:00 a.m. – 10:00 a.m. **Academy Class – Key Grants and the Common Missteps and
Roadblocks**
Delaware 2

Grants are becoming an increasing segment of a municipality's funding makeup. Understanding some of the core regulations for securing some of Indiana's more prevalent municipally targeted grants is a must for clerks and clerk-treasurers who wear many hats. Securing your SAMs registration, updating your community's asset management plans, understanding ADA requirements, and much, much more, will not only help your city or town operate more

efficiently, it will also make your grant applications move more effectively through the review and award process. If you don't possess significant knowledge of a grant's requirements and all of the facts and fine print, valuable time can be wasted and critical funds could be left on the table.

Speakers:

Shari Johnson, Clerk-Treasurer, Advance

Shannon McLeod - Grant Writer / Administrator, Priority Project Resources, Inc.

9:00 a.m. - 10:00 a.m.

Institute Class - If at First You Don't Succeed: Take Notes and Learn from the Mistakes

Delaware 1

As clerk-treasurers, most aim for perfection and clean audits. However, reality reminds us that we are all humans and we all make mistakes. From little to big mishaps, join us as we dive into past mistakes and collaborate together to develop action plans to correct and even prevent blunders in your office. As a veteran clerk has said, "Mistakes can be fixed, unless you are stealing."

Speakers:

Karen Heim, Clerk-Treasurer, Culver

Kayla Pauley, Clerk-Treasurer, Cromwell

10:00 a.m. - 12:00 p.m.

Institute Class - Parliamentary Procedures and Robert's Rules of Order

Delaware 1

Running an effective municipal public meeting, in part, requires sound guidelines for conducting the business of the governing body. In the United States, one of the most widely used manuals on parliamentary procedure is Robert's Rules of Order, written originally by Gen. Henry M. Robert. Following Robert's Rules of Order, commonly referred to as Robert's Rules, deters straying from the topic

at hand, leads to more accurate minutes, helps with the flow of the decision-making process, and much more. This workshop will review the adoption of Robert's Rules as the body's rules for governing conduct, the core uses of Robert's Rules in a municipal setting, and any common misconceptions or misuses of Robert's Rules.

Speaker:

Michael Griffin, Former Indiana Senator and Clerk-Treasurer of Highland (1992 - 2022)

10:00 a.m. - 12:00 p.m. **Academy Class - Get the Lead Out and Water Loss Audits**
Delaware 2

Most communities have not started a service inventory list and are somewhat lost on acquiring the information. The issue is not only developing a lead service inventory but obtaining SRF funding to replace and acquiring a contractor to stage the service replacement over the next four years. We are in year four of five to obtain extra funding to replace lead service. All aspects of what is a lead service line will be covered including: developing an inventory, submitting for funding, and implementation of replacing the service. Furthermore, in 2015, Indiana utilities produced over 50 billion gallons of water that did not generate revenue, resulting in a loss of \$54.6 million. To better understand non-revenue water, the Indiana Legislature adopted IC 8-1-30.8, which obligates water utilities to complete annual water audits. In general, a water loss audit is an evaluation of the amount of water a utility pumps and sells. The main benefit of doing an audit is to identify these losses so the utility may take corrective action, which often leads to financial savings. The Indiana Finance Authority will explain the water audit process and the role a clerk-treasurer may have in the same.

Speakers:

Ragan Dalton, Software Support, Boyce Systems

Audi Findley, Superintendent, Greenville

Jeremy Hardy, Project Engineer, Commonwealth Engineers, Inc.

Chris Harrison, Business Development Manager, Commonwealth Engineers, Inc.

Sarah Hudson, Director, Indiana Finance Authority

Randy Jackson, Water Department Supervisor, Logansport

Chad Reynolds, Water Circuit Rider, Alliance of Indiana Rural Water

12:00 p.m. – 1:15 p.m.

Luncheon

Interurban Hall

1:30 p.m. – 2:30 p.m.

Institute & Academy Class – Now You See It, Now You Don't: Programs for Addressing Indiana's Above and Below Ground Infrastructure

Delaware 1

The federal Bipartisan Infrastructure Law (BIL) provided groundbreaking funding for Indiana's transportation network, as well as many other communications and utility assets. Likewise, the Indiana General Assembly recently adopted a well-thought-out plan to assist with aging water and wastewater systems. Experts will be on hand during this workshop to offer detailed information about these and other programs, and how your community can use existing and new opportunities to maximize all available dollars to your community's advantage.

Speakers:

Jim McGoff, Chief Operating Office, Indiana Finance Authority

Justin Schneider, Director of Consumer Affairs, Indiana American Water

2:30 p.m. – 3:30 p.m.

Institute Class – Understanding Capacity-Related Fees and Recent Legislative Changes

Delaware 1

In 2022 the legislature passed a bill that prohibits a municipal utility from including contributions in aid of construction in capacity-related fees or tap fees. This refers to costs associated with system-wide improvements fees commonly called system development charges, interceptor fees, or availability fees. This introductory class will ensure participants understand why communities charge such fees, how such fees are calculated and what kinds of costs have traditionally been included in tap fees. Instructors will also cover the basics of tap fee-related provisions included in HEA 1245-2022, as well as IURC process changes and related septic provisions.

Speaker:

Michael Griffiths, Partner, Dentons Bingham Greenebaum

2:30 p.m. – 3:30 p.m.

Academy Class – Job Description Development

Delaware 2

Steve Seibold, HR Advisor with Tilson HR, will be presenting on job description development. The session will discuss ways to determine what is needed, identify the essential functions, and compile the information effectively. We will also review the purpose and use of the job description from recruitment to performance evaluation. Finally, we will use a template to practice application of this information.

Speaker:

Steven Seibold, Human Resources Advisor, Tilson HR

3:30 p.m. – 4:30 p.m.

Institute Class – Workplace Conflict

Delaware 1

When the public looks to you for guidance and as a barometer for how the community is doing, having workplace conflicts with colleagues, employees, or the public, does not inspire confidence. This course will use scenarios and lots of audience participation to really dissect contentious situations and help you navigate some of the stickiest situation in a manner you and your constituents can be proud of.

Speaker:

Kristie Bone, Clerk–Treasurer, LaGro

3:30 p.m. – 4:30 p.m.

Academy Class – New Development, Capacity–Related Fees and Adequately Funding Your Utility

Delaware 2

For clerks and clerk–treasurers that have used or have a base knowledge of utility tap fees, this workshop will drill down on the implementation of HEA 1245–2022, the legislature’s prohibition of including contributions in aid of construction in capacity–related fees or tap fees. Panelists will discuss how to approach new development projects, while maintaining your community’s ability to adequately fund vital utility operations, including the importance of taking an extensive look at your utility’s rate structure.

Speaker:

Michael Griffiths, Partner, Dentons Bingham Greenebaum

4:30 p.m. – 5:30 p.m.

Institute & Academy Class – All Things Broadband: State and Federal Updates

Delaware 1

It is simply impossible to conduct business, obtain an education, manage medical care, and provide government services without relying, at least in part, on the internet. As

more online services and learning options become the norm, the speed of a community's internet and equitable access becomes a true economic and talent attraction concern. While it may seem daunting, there are many state and federal programs to help! Attendees will learn about Next Level Connections, Indiana Connectivity Program, and the Affordable Connectivity Program. Take home the latest information regarding available funding through the federal Infrastructure Investment and Jobs Act and gain insight on engaging your citizens and being champion for this vital communications tool.

Speaker:

Earnie Holtrey, Deputy Director of the Indiana Broadband Office of Lt. Governor Suzanne Crouch

7:00 p.m. – 9:00 p.m.

Snacks / Institute & Academy Class – Succession Planning

Sponsored by LWG CPAs & Advisors

Delaware 1

All good things must come to an end. Sometimes we have control of the narrative and can determine how our story ends, and then other times we do not – it is determined for us. This discussion session will help address the plans that every Clerk and Clerk-Treasurer should already have or needs to begin to address for the end of their service. Examples of what could happen without proper planning will be provided along with suggestions and checklists that everyone should have as they enter office and why it should be reviewed and updated as you continue to serve.

Speaker:

Jim Higgins, Partner, LWG CPAs & Advisors

Wednesday, March 22

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m. **Registration**
Main Lobby

7:30 a.m. – 8:00 a.m. **Breakfast**
Interurban Hall

8:00 a.m. – 10:00 a.m. **Institute & Academy Class – Lifecycle of Employee’s
Relationship with Your Municipality**
Delaware 1

Join us to discuss the lifecycle of the employee’s relationship with your municipality to include: what needs to be included in a job posting, dos and don’ts on the employment application, dos and don’ts of the interview, legal background check requirements, forms required from a new hire, what should legally be included in a job description, how to classify an employee in coordination with the Fair Labor Standards Act (FLSA) and the payment of overtime/compensatory time, important employee handbook policy requirements, salary ordinance requirements, compliance poster requirements, employee file requirements, what to do at termination, and much more. Participants will be provided with tools to use for some of these processes, as well as helpful ideas on how to improve their own procedures and practices in coordination with best practices, and federal and state employment-related laws and the National Labor Relations Act (NLRA).

Speaker:

Kristen Deutsch, M.B.A., CCP, President, New Focus HR, LLC

10:00 a.m. – 11:00 a.m. **Institute & Academy Class – Parks Master Planning: When, Why, and How (and How Much)?**

Delaware 1

Managing parks and parks programs is not *all* fun and games. Because parks are public assets, a strategic, community-driven vision is critical. And to access certain grants and state funding programs, documenting this vision is a requirement. The workshop will review 5-year parks and recreation master plan timing, options, and its basics, answering your questions and giving you some vital tips for engaging your citizens in the shaping of your city or town's most important amenities.

Speaker:

Greg Beilfuss, Chief Planner, Department of Natural Resources

11:00 a.m. – 12:15 p.m. **Luncheon**

Interurban Hall

12:30 p.m. – 2:00 p.m. **Institute & Academy Class – It's Time to Test Your Knowledge!**

Delaware 1

It's time to test your knowledge! Not sure of an answer, that's okay! This interactive team building workshop will get you thinking and discussing important aspects relating to your position as clerk or clerk-treasurer with your peers. Be sure to pay attention throughout the week because it's quite possible what you are learning in other workshops will be included in this fun and educational workshop!

Speakers:

Carrie Mugford, Clerk-Treasurer, North Manchester

Miriah Tobias, Deputy Clerk-Treasurer, North Manchester

2:00 p.m. – 3:30 p.m. **Institute & Academy Class – Insurance Premium Audits**
Delaware 1

The goal of this workshop is to better prepare your municipality for an Insurance Premium Audit. This discussion will cover the audit process, how to analyze a Worker's Compensation policy, review audit rules and applicable municipal classifications, and cost savings procedures.

Speaker:

Bob Davidson, Employee Benefits Vice President, Indiana Public Employers Plan

3:30 p.m. – 4:30 p.m. **Institute & Academy Class – Indiana Public Retirement System (INPRS) and Public Employees Retirement Fund (PERF)**
Delaware 1

This PERF presentation will provide attendees with general historical information regarding the Indiana Public Retirement System and PERF. Additionally, the presentation will cover PERF benefit information and the options that will be available to members as they approach retirement, as well as the process a member can expect to go through as they continue in their career.

Speaker:

Kevin Marshall, Retirement Services Consultant, INPRS

4:30 p.m. – 5:30 p.m. **Institute Class – How Organizing Your Office Equals Good Constituent Services**
Delaware 1

Keeping an organized office is about more than having neat and tidy desk. While a clean desk is certainly nice, having a broader culture of orderliness will help ensure your office can provide more efficient, timely, and accurate service. Finding records upon request, retaining records properly, and reducing mistakes that can be caused by haphazard

document and information management are just a few benefits of taking your office from chaos to composed. Join us for this informative discussion and bring your own examples of how getting organized has paid off for you and your residents!

Speaker:

Bob Ferguson, Clerk-Treasurer, Roann

4:30 a.m. – 5:30 p.m.

Academy Class – Servant Leadership & Community: It’s Who We are FOR Each Other, Not TO Each Other

Delaware 2

We will explore servant leadership as a personal and professional journey expressed through relationships and encounters. Understanding the philosophy, principles, and practices guides us from a *way of being* to a *way of doing*. People grow, become healthier, wiser, freer and more autonomous, and more likely to serve. Where we start really does matter.

Speaker:

Phillip G. Anderson, Founder & Chief ReThinker, ReThink Consulting Group

Thursday, March 23

7:30 a.m. – 8:00 a.m.

Registration

Main Lobby

8:00 a.m. – 9:00 a.m.

Breakfast/ Institute & Academy Class – Websites and the ADA

Delaware 1

It is often said that municipal government is the government closest to the people. This literal and figurative proximity results in a reasonable (and often times lawful) presumption that city and town governments is accessible to all the citizens it serves. Accessibility doesn’t always mean via bricks and mortar, however. It also applies to the virtual

world of websites, email, and many other forms of electronic communications. This workshop will cover the Americans with Disabilities Act and Title VI requirements relative to your community's digital tools. Even the most seasoned Clerk and Clerk-Treasurer will need this information to ensure your community has the latest advice, information, and best practices to serve your ENTIRE community and avoid costly consequences for taxpayers.

Speakers:

Ben Merida, First Deputy Clerk, Martinsville

Michael Momcilovich, Principal, Google Public Sector State and Local Government – Indiana

Kevin O'Keefe, Director of Creative Services, NIC Division, Tyler Technologies, Inc.

Mike White, Deputy Chief Technology Officer, Indiana Office of Technology

9:00 a.m. – 10:00 a.m.

Institute & Academy Class – Opioid Settlement Funds: Putting Your Funds to Work to Address the Opioid Crisis

Delaware 1

Indiana cities and towns recently received their much-anticipated opioid settlement funds. This session will cover how these funds can be used as outlined by the national settlement documents, how communities are planning to use the funds, and current and pending legislation and budget considerations. This workshop will offer great tips and guidance on spending these funds in a manner that makes a lasting impact on the communities you serve.

Speakers:

Becca McCuaig, Chief Legal Counsel, Aim

Shelby Thomas, Deputy Director for Drug Prevention, Treatment and Enforcement and Chairman of the Indiana Commission to Combat Substance Use Disorder, State of Indiana

10:00 a.m. – 11:00 a.m. **Institute Class – Elections**

Delaware 1

The Indiana Election Division will discuss state election laws that are relevant to municipal government leaders, including the procedural nuances of the 2023 municipal election cycle and filling elected office vacancies.

Speakers:

Brad King, Co-Director, Indiana Election Division

Angela Nussmeyer, Co-Director, Indiana Election Division

10:00 a.m. – 11:00 a.m. **Academy Class – Overview of OSHA Reporting and Recordkeeping Requirements**

Delaware 2

This workshop will introduce Occupational Safety and Health Administration (OSHA) and overview of OSHA Recordkeeping Regulation (29 CFR 1904). Main objectives of the workshop are to teach employers how to properly record workplace injuries and illnesses, as well as to teach employers how to properly report fatalities and serious injuries in order to comply with OSHA Regulation.

Speaker:

Josh Schermerhorn, Sr., Risk Management Specialist, IPEP

11:00 a.m. – 12:00 p.m. **Wrap-Up Closing Session Q&A**

Delaware 1

Last call! Before you head for home, attend this final session to ask questions, seek advice, vent, or share something important with your fellow ILMCT members and Institute & Academy attendees.

Speakers:

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale