

NEO

Newly Elected Officials Training



aim
medical trust



bakertilly

INTRODUCTION

LEARNING THE TOOLS FOR SUCCESS

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

Every four years, Accelerate Indiana Municipalities (Aim) conducts Newly Elected Officials Training to provide basic information and tools for city and town officials, helping them manage their first weeks in office and build a foundation for a successful term. Four years ago, Aim's Newly Elected Officials Training assisted more than 1,000 city and town officials. The 2023-2024 program, presented in partnership with the Aim Medical Trust and Baker Tilly Municipal Advisors, LLC, promises to be bigger and better and will benefit both municipal government newcomers and veterans alike.

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

4 EASY WAYS TO REGISTER

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

INDIANA MUNICIPAL OFFICIALS HANDBOOK

The Indiana Municipal Officials Handbook is a nearly 300-page reference guide published every four years by Aim for city and town officials. The handbook reviews the structure and operations of city and town government, applicable statutes, and sources of state and federal programs. Each municipal official registered for Boot Camp will receive one of these coveted handbooks. Further, the Handbook will be updated annually and available via digital download until the edit edition in 2028.

ABOUT AIM

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

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

ABOUT AIM MEDICAL TRUST

The Aim Medical Trust provides cities and towns across Indiana with a fiscally responsible approach to healthcare. The Trust is a risk sharing pool, managing the healthcare costs of municipal employees and their families, providing long-term financial stability of premiums with quality healthcare plans for its 63 member communities and coverage for nearly 10,000 Hoosiers. The Trust is part of Aim and is motivated by members' desire to control and stabilize healthcare costs.

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



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REGIONAL TRAINING

DECEMBER 2023

Aim Regional Training sessions are held in the weeks following municipal elections. The day-long workshop will be offered in five locations across the state and will focus on the first weeks in office, including what to expect at the first council meeting. You will be given critical tools that you will need during transition and when you hit the ground running on day-one. These training sessions are staffed by veteran municipal officials, Aim staff, and leading municipal experts. **Aim Regional Trainings have been approved by the Indiana State Board of Accounts (SBOA) and will count towards the five hours of approved training courses needed by fiscal officers before taking office as described in IC 36-4-10-8.**

REGIONAL TRAINING AGENDA	
All times are local.	
DECEMBER <i>Join us at one of the locations listed on the right!</i>	
8:30 a.m.	Registration
9:00 a.m.	Welcome and Opening Remarks
9:30 a.m.	Introduction to Aim and the Nuts and Bolts of Municipal Government
10:45 a.m.	Common Transitional Challenges and Immediate Employment Essentials
12:00 p.m.	Lunch with Question and Answer Session
1:00 p.m.	Meetings and Public Access Dos and Don'ts
1:45 p.m.	Municipal Finance and Budgeting
2:55 p.m.	Your First Days in Office
3:55 p.m.	Closing Remarks and Adjourn

LOCATION / DATE	ADDRESS
EVANSVILLE MONDAY, DECEMBER 4	Old National Events Plaza 715 Locust Street Evansville, IN 47708
NOBLESVILLE* SATURDAY, DECEMBER 9	Embassy Suites Noblesville Indianapolis Conference Center 13700 Conference Center Drive South Noblesville, IN 46060
FORT WAYNE TUESDAY, DECEMBER 12	Grand Wayne Center 120 W Jefferson Boulevard Fort Wayne, IN 46808
FAIR OAKS FARMS WEDNESDAY, DECEMBER 13	The Farmhouse Conference Center 754 N 600 E Fair Oaks, IN 47943
MADISON MONDAY, DECEMBER 18	Fairfield Inn-Madison Cotton Mill 108 Saint Michael Avenue Madison, IN 47250

*Hotel Reservations *(Noblesville Regional Only)*

Hotel reservations can be made by contacting the Embassy directly at (317) 674-9043. Request the Aim Regional NEO room block to receive the special rate of \$159.00 per night. The online reservation booking link can be found online at www.aimindiana.org/neo. Reservations must be made by November 21 to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and sponsors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.

ABOUT BAKER TILLY MUNICIPAL ADVISORS, LLC

Baker Tilly Municipal Advisors work with communities to help resolve financial issues to improve your operations and the quality of life for your communities. Because they are a certified public accounting firm, Baker Tilly pairs the ethics, structure, quality control, and business discipline of a CPA firm with the skills and knowledge of a municipal financial advisor. Baker Tilly Municipal Advisors specialize in advising governments,

including cities, towns, villages, townships, counties, authorities, utilities, public schools, and libraries, as well as higher education, healthcare entities, and economic development organizations.



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MAYORS SCHOOL

DECEMBER 6-8, 2023

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

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

MAYORS SCHOOL AGENDA

All times are local.

WEDNESDAY, DECEMBER 6

3:30 p.m.	Registration
4:30 p.m.	Opening General Session and Introductions
5:30 p.m. - 7:00 p.m.	Networking Time
7:00 p.m. - 9:00 p.m.	Evening Open for Sponsor Events
9:00 p.m. - 11:00 p.m.	Networking Time

THURSDAY, DECEMBER 7

7:30 a.m.	Registration
8:00 a.m.	Continental Breakfast
8:45 a.m.	Opening Session and Welcome
9:15 a.m.	Transitioning from the Campaign to City Hall
10:15 a.m.	Municipal Finance
11:15 a.m.	Keeping Out of Trouble with the 1st Amendment Rights of Employees
12:00 p.m.	Lunch and Learn: Quality of Place is Serious Business in Today's Race for People (and the jobs that follow)

THURSDAY, DECEMBER 7 *(Continued)*

1:15 p.m.	Media Relations and the Mayor
2:15 p.m.	Public Safety Issues
3:30 p.m.	Facilitated Roundtable
5:30 p.m.	Mayors Only Private Event Sponsored by Aim Medical Trust and Baker Tilly Municipal Advisors, LLC
7:00 p.m. - 8:00 p.m.	Reception — Open to All Attendees and Sponsors
8:00 p.m. - 11:00 p.m.	Networking Time

FRIDAY, DECEMBER 8

8:00 a.m.	Breakfast
8:45 a.m.	Quality of Life Panel Discussion
10:00 a.m.	The Mayor's Role in Promoting Economic Development
11:00 a.m.	The Role of Mayor Beyond City Limits
11:30 a.m.	Taking it Home
11:45 a.m.	Adjourn

Hotel Reservations

Hotel reservations can be made by contacting the Embassy directly at (317) 674-9043. Request the Aim 2023 Mayors School room block to receive the special rate of \$159.00 per night. The online reservation booking link can be found online at www.aimindiana.org/neo. Reservations must be made by November 21 to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and sponsors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.



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CLERK-TREASURERS AND COUNCIL MEMBERS WORKSHOPS

JANUARY 16, 2024

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

Aim Council Members Workshop is a vital education day for elected council members and is a must attend for new and veteran council members.

Clerk-Treasurers Workshop

THE WESTIN INDIANAPOLIS
241 W Washington Street | Indianapolis, IN 46204

Council Members Workshop

THE INDIANA CONVENTION CENTER: Rooms 201 and 202
100 S Capitol Avenue | Indianapolis, IN 46225

CLERK-TREASURERS AGENDA	
All times are local.	
TUESDAY, JANUARY 16	
8:30 a.m.	Registration and Orientation for New Clerk-Treasurers Hosted by Indiana League of Municipal Clerks & Treasurers (ILMCT)
9:30 a.m.	Welcome and Opening Remarks
9:45 a.m.	State Board of Accounts (SBOA) – An Overview
11:00 a.m.	The Role of the Department of Local Government Finance (DLGF)
12:00 p.m.	Lunch
1:00 p.m.	Gateway
2:15 p.m.	Federal Grants and Programs
2:45 p.m.	Fiscal Duties and Other Items
3:45 p.m.	Question and Answer Session
4:00 p.m.	Adjourn

COUNCIL MEMBERS AGENDA	
All times are local.	
TUESDAY, JANUARY 16	
8:30 a.m.	Registration at the Westin
9:30 a.m.	Welcome and Opening Remarks
9:45 a.m.	Council Member Responsibilities and the Mechanics of a Council Meeting
10:45 a.m.	Mock Event Part 1: Council Members Council Meeting and Follow-up Discussion
12:30 p.m.	Lunch
1:30 p.m.	Mock Event Part 2: Council Members Council Meeting and Follow-up Discussion
3:15 p.m.	How, When, and Why Municipal Offices Work Together
4:15 p.m.	Adjourn

Hotel Reservations

Hotel reservations can be made by contacting the Westin directly at (800) WESTIN-1. Request the Aim room block to receive the special rate of \$154.00 per night. The online reservation booking link can be found online at www.aimindiana.org/neo. Reservations must be made by December 28 to receive the Aim rate. Aim is not responsible for hotel reservations or cancellations. Only registered conference attendees and exhibitors may occupy a room in the conference hotel block. Aim reserves the right to modify hotel reservations.

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



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BOOT CAMP

JANUARY 16-18, 2024

THE WESTIN INDIANAPOLIS

241 W Washington Street | Indianapolis, IN 46204

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

Boot Camp promises to be that one place where those new to an office or administration can get their questions answered. For veteran municipal officials, Boot Camp offers many opportunities to refresh your skills and brush up on some of the newest laws and best practices. Highlights of the three-day event are extensive workshops, several peer networking opportunities, a can't-miss exhibit hall packed with municipal experts, and your own copy of the sought after 2024 Aim Indiana Municipal Officials Handbook.

BOOT CAMP AGENDA	
All times are local.	
TUESDAY, JANUARY 16	
11:00 a.m. - 5:00 p.m.	Boot Camp Registration
2:00 p.m. - 7:00 p.m.	Exhibit Hall Open
4:00 p.m. - 5:00 p.m.	Early-Bird Workshops <ul style="list-style-type: none"> Basic Training: Advocating for your Community and Aim at the Indiana Statehouse Understanding the Mechanics of Tax Increment Financing and its Allowable Uses Transportation Funding
5:00 p.m. - 7:00 p.m.	Welcome Reception in Exhibit Hall
7:00 p.m.	Grand Prize Giveaway in Exhibit Hall
7:00 p.m.	Evening Open for Sponsor Events
7:00 p.m. - 11:00 p.m.	Networking Time
WEDNESDAY, JANUARY 17	
8:00 a.m. - 9:00 a.m.	Registration
8:00 a.m. - 9:00 a.m.	Continental Breakfast
9:00 a.m. - 10:30 a.m.	Opening General Session
10:45 a.m. - 12:00 p.m.	Concurrent Workshops <ul style="list-style-type: none"> Class 1 and 2 Cities Class 3 Cities Towns above 2,000 Towns below 2,000
12:00 p.m. - 2:00 p.m.	Luncheon and Featured Speaker
2:15 p.m. - 3:30 p.m.	Concurrent Workshops <ul style="list-style-type: none"> Public Records and Open Door Law Code Enforcement Ethics and Conflict of Interest Public Works and Utilities

WEDNESDAY, JANUARY 17 <i>(Continued)</i>	
3:45 p.m. - 5:00 p.m.	Concurrent Workshops <ul style="list-style-type: none"> Public Records and Open Door Law Code Enforcement Ethics and Conflict of Interest Public Works and Utilities
5:30 p.m. - 7:00 p.m.	Reception
7:00 p.m.	Evening Open for Sponsor Events
9:00 p.m. - 11:00 p.m.	Networking Time
THURSDAY, JANUARY 18	
7:30 a.m. - 8:30 a.m.	Continental Breakfast
8:30 a.m. - 9:30 a.m.	Peer Roundtable Sessions <ul style="list-style-type: none"> Mayors Town Council Members Municipal Managers City Council Members Fiscal Officers and Clerks Department Heads and Staff
9:45 a.m. - 11:00 a.m.	Concurrent Workshops <ul style="list-style-type: none"> Human Resources Budgets Public Finance Contracts and Purchasing
11:15 a.m. - 12:30 p.m.	Concurrent Workshops <ul style="list-style-type: none"> Human Resources Tax Increment Finance Public Meeting Management Public Safety
12:30 p.m. - 2:00 p.m.	Closing Luncheon and Featured Speaker

Hotel Reservations

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AIM NEWLY ELECTED OFFICIALS TRAINING REGISTRATION

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

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

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

REGISTRATION FEES

REGIONAL TRAINING			
LOCATION	BY NOV 28	AFTER NOV 28	AMOUNT
DEC 4 / EVANSVILLE	\$109	\$129	
DEC 9 / NOBLESVILLE	\$109	\$129	
DEC 12 / FORT WAYNE	\$109	\$129	
DEC 13 / FAIR OAKS FARMS	\$109	\$129	
DEC 18 / MADISON	\$109	\$129	
MAYORS SCHOOL			
ATTENDEE	BY DEC 1	AFTER DEC 1	AMOUNT
MUNICIPAL OFFICIAL	\$199	\$219	
*SPOUSE / GUEST	\$109	\$129	
CLERK-TREASURERS WORKSHOP			
ATTENDEE	BY DEC 29	AFTER DEC 29	AMOUNT
MUNICIPAL OFFICIAL	\$109	\$129	
COUNCIL MEMBERS WORKSHOP			
ATTENDEE	BY DEC 29	AFTER DEC 29	AMOUNT
MUNICIPAL OFFICIAL	\$109	\$129	
BOOT CAMP			
ATTENDEE	BY DEC 29	AFTER DEC 29	AMOUNT
MUNICIPAL OFFICIAL	\$309	\$329	
*SPOUSE / GUEST	\$209	\$229	
TOTAL AMOUNT DUE:			

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

REIMBURSEMENT AND REFERENCE MATERIALS

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

CANCELLATION POLICY

Only written cancellations will be accepted. Please mail your written cancellation to 125 W Market Street, Suite 100, Indianapolis, IN 46204; fax to (317) 237-6206 or send to bbystry@aimindiana.org. Written cancellations received five business days prior to the event, will be refunded less a \$40 processing fee. Aim is not responsible for hotel reservations or cancellations.

METHOD OF PAYMENT

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

PLEASE CHECK THE BOOT CAMP EVENTS YOU PLAN TO ATTEND:

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

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

Please note **Clerk-Treasurers and Council Members Workshops registrations are not included in the Boot Camp registration.** If you plan to attend one of the Workshops and Boot Camp, you must register for each individual event.

SPECIAL NEEDS AND DIETARY RESTRICTIONS DUE TO ALLERGIES

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

E-VERIFY COMPLIANCE

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



125 W. Market St., Suite 100
Indianapolis, IN 46204

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