



Agenda

March 17–21, 2024

Embassy Suites by Hilton Plainfield Indianapolis Airport
Plainfield, Indiana

Sunday, March 17

2:00 p.m. – 6:00 p.m.

Registration
Prefunction A

2:00 p.m. – 2:45 p.m.

Meet & Greet
Hendricks A & B

3:00 p.m. – 4:00 p.m.

Welcome & Opening Session
Hendricks A & B

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 professional certifications available to ILMCT members will

be shared. You will not want to miss this foundation-setting session!

Speakers:

Robin Brandgard, Council Member, Plainfield

Karen Heim, Clerk-Treasurer, Culver

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale

Dr. Chip Taylor, Institute Director, Ball State University

Mark Todisco, Clerk-Treasurer, Plainfield

4:00 p.m. – 5:00 p.m.

Institute & Academy Class – Get to know the Indiana Law Enforcement Academy (ILEA)

Hendricks A & B

This workshop is intended to provide an overview of the ILEA (Indiana Law Enforcement Academy). It will provide essential information regarding the community's cost, responsibilities, and the admission requirements to send an officer to the academy as well as the requirements for the officer to successfully complete the course. In addition, this workshop will provide information regarding training current officers need to become a certified instructor and the requirements to keep their instructor certification.

Speakers:

Tim Harty, Executive Director, Indiana Law Enforcement Academy

Bryan Shearer, Police Chief and Public Safety Director, Ligonier and Indiana Law Enforcement Academy Training Board Member

5:00 p.m. – 6:00 p.m. **Institute & Academy Class – The Indiana Utility Regulatory Commission: What is it? Who needs to know? What is required?**

Hendricks A & B

Wes Bennett, former Clerk-Treasurer and DLGF Commissioner, and current Commissioner of the Indiana Utility Regulatory Commission (IURC), will offer attendees an overview of the IURC. The Commissioner will cover which utilities are under the Commission’s purview and what exactly it means to be overseen by the IURC. Additional topics will include applicable reporting requirements, statutory authority of the IURC, and best regulatory practices for municipal utilities.

Speaker:

Wes Bennett, Commissioner, Indiana Utility Regulatory Commission

6:30 p.m. **Breaking the Ice**

Hendricks C

Join your peers for a casual and fun way to get to know one another, enjoy dinner, play trivia, and walk away with a prize and bragging rights as a winner!

Monday, March 18

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m. **Registration**
Prefunction A

7:30 a.m. – 8:00 a.m. **Breakfast**
Hendricks C

8:00 a.m. – 4:00 p.m. **State Board of Accounts Resource Center**
Prefunction B

During major educational events, experts from the State Board of Accounts are on-hand to point you in the right direction to answer your questions or address ongoing challenges.

8:00 a.m. – 9:00 a.m.

Institute Class – Trash or Treasure: Retention, Preservation, and Disposal of Records

Hendricks A & B

Have you found old coffee cans full of town records? Have you tossed records you later realized you should have kept? Is the process confusing and you aren't sure you completed the right forms? Public records management is about more than preserving history; you need to comply with regulations and ensure transparency, accountability, and accessibility. This workshop will provide hands-on training and answer all the questions you've been wondering while managing the vast amount of paperwork in your office.

Speakers:

Bob Ferguson, Clerk-Treasurer, Roann

Anna Lucas, Electronic Records Archivist, Indiana Archives and Records Administration

Madison Young, County/Local Records Management Liaison, Indiana Archives and Records Administration

8:00 a.m. – 9:00 a.m.

Academy Class – INPRS Audits

Hendricks D & E

You may not be a stranger to an audit, but one from the Indiana Public Retirement System (INPRS) may seem daunting. To ensure accuracy, transparency, and legal compliance in managing pension funds and providing retirement benefits, INPRS may come to your community for an audit. This workshop will discuss preparing for the audit, including what documents to create, records to keep, and reports to run. In addition, you'll hear from a community that recently completed an INPRS audit.

Speakers:

Katrina Farley, Consultant, Indiana Public Retirement System

Shari Johnson, Clerk-Treasurer, Advance

9:00 a.m. – 11:00 a.m.

Institute Class – Nuts & Bolts: Part 1

Hendricks A & B

In construction, nuts and bolts are the basic items that hold structures together. Without them, a structure will not stand. This class will cover basic items clerk-treasurers need to know in order to hold their municipalities together. Topics include a review of the duties of clerk-treasurers and a calendar of responsibilities. On the clerk side, providing meeting notices, navigating the types of meetings, and completing minutes will be covered. On the treasurer side, receipts, expenses, appropriations, and bank reconciliations will be addressed.

Speakers:

Terri Budde, Clerk-Treasurer, Remington

Karen Heim, Clerk-Treasurer, Culver

Erica Lyden-Giger, Clerk-Treasurer, Prince's Lakes

Cindy Morrison, Clerk-Treasurer, Dale

9:00 a.m. – 11:00 a.m.

Academy Class – High Stakes: Revenues from Charitable and Casino Gaming, and Risk Mitigation for Special Events

Hendricks D & E

Non-traditional revenues can sometimes come with a few strings attached and possibly some risk. For example, your casino or bingo night may necessitate a charitable gaming permit. In this workshop participants will also learn risk mitigation steps you need to understand before planning your next event.

Speakers:

Mark Mason, Director, Charity Gaming Division, Indiana Gaming Commission

Scott Lage, Vice President of Claims, Bliss McKnight, Inc.

11:00 a.m. – 12:15 p.m. **Luncheon – Municipal Swag Swap and Q&A**
Hendricks C

Drop your questions in the famous wooden box and your fellow clerks and clerk-treasurers will come to your aid. And to make the process more exciting, bring a symbol of community pride featuring your municipality's name or slogan to trade with your colleagues!

12:30 p.m. – 2:30 p.m. **Institute & Academy Class – Getting to Know the State Board of Accounts**
Hendricks A & B

The State Board of Accounts will be discussing the varying components of their agency and the role they play in auditing municipalities. This discussion will delve further into an overview of the agency and the engagements they perform. Agency experts will discuss the diverse types of engagements and what is expected from you as an auditee. The types of comments you may receive during an audit will be examined, along with the resources offered by the SBOA not only to correct any audit comments, but also to assist in your daily workings as an elected official.

Speakers:

Beth Goss, Governmental Technical Assistance & Compliance Director, State Board of Accounts

Mitch Wilson, Governmental Technical Assistance & Compliance Director, State Board of Accounts

2:30 p.m. – 5:00 p.m. **Institute & Academy Class – Traditional and Social Media Transparency and Best Practices**
Hendricks A & B

For the first part of this workshop participants will get a quick primer on the different social media platforms used by most municipalities and how they utilize them to communicate with their citizens. Further, we'll explore social media policies and why they are necessary, capped off by some thoughts from Indiana's public access counsellor relative to social media access and retention requirements. The balance of time will be spent hearing from an experienced media advisor about how you can develop skills that will help you tell your community's story and stay out of hot water with the press, and an extended question and answer period.

Speakers:

Luke Britt, Public Access Counselor, Office of the Public Access Counselor

Nicole Bolden, City Clerk, Bloomington

Kristie Bone, Clerk-Treasurer, LaGro

Barry McGinley, Attorney, Frost Brown Todd

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

Jennifer Simmons, Chief Operating Officer, Aim

7:00 p.m. – 9:00 p.m. **Networking Reception**
Sponsored by Boyce Systems
Embassy Suites by Hilton Plainfield Lobby Bar

Tuesday, March 19

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m. **Registration**
Prefunction A

7:30 a.m. – 8:00 a.m. **Breakfast**
Hendricks C

8:00 a.m. – 10:00 a.m. **Institute & Academy Class – Robust Internal Controls Send a Message of Sound Management and Competency**
Hendricks A & B

Whether this is your first or tenth class on internal controls, we guarantee this will be the most engaging and exciting class you’ve attended on the topic. Together we will review and outline the core concepts and necessities for internal controls. Next, we will divide into groups where you will have time to walk through examples of internal controls procedures and Q&A that is relevant to your community’s size and office. We promise both new and veteran officials alike will leave this class with tools and information to implement or improve their internal control procedures.

Speakers:

Julie Heidbreder, Deputy Clerk, Crown Point

Karen Heim, Clerk–Treasurer, Culver

Sheri Herma, Deputy Clerk, Crown Point

Carrie Mugford, Clerk–Treasurer, North Manchester

Kayla Pauley, Clerk–Treasurer, Cromwell

Miriah Tobias, Deputy Clerk–Treasurer, North Manchester

10:00 a.m. – 12:00 p.m. **Institute & Academy Class – Becoming a Rockstar**
Hendricks A & B

As the Rolling Stones said, “It’s only rock and roll, but I like it!” Speaker Jonathan Baker will explain how principles of leadership are intertwined with rock and roll music. The emotion and physical connection to music is so powerful that it has produced leaders who have influenced generations. This highly interactive and lively discussion will address how you can develop your own individual leadership skills in both your work and personal lives.

Speaker:

Jonathon Baker, Senior VP, Zions Bancorporation

12:00 p.m. – 1:15 p.m. **Luncheon**
Hendricks C

1:30 p.m. – 2:30 p.m. **Institute & Academy Class – Public Speaking**
Hendricks A & B

Back for Round Two, Jonathan Baker will use the former presentation and guide participants through the steps of preparing to speak. Rest assured, participants will not be asked to give two-hour presentations and sing songs. However, the concepts learned will help everyone feel more confident speaking in council or board meetings. This session will also focus on the things that scare us about speaking and what strategies we can take to overcome those fears. Like the first presentation, this will be a very interactive workshop, and participants should leave with actionable steps to take.

Speaker:

Jonathon Baker, Senior VP, Zions Bancorporation

2:30 p.m. – 4:30 p.m. **Institute & Academy Class – Certifications: ILMCT, Aim, IIMC, and APT**
Hendricks A & B

Get to know the associations, affiliate groups and even international organizations that can be immensely helpful to you in your municipal role. This session will also cover the important, and sometimes confusing, world of education certifications. Understanding all of these programs will help you develop goals for your ongoing education and earn various certification levels to help communicate your commitment and growing expertise to the citizens you serve. Finally, a review of the available listservs and how to properly use this resource will be explained by our panel.

Speakers:

Matt Greller, Chief Executive Officer, Aim

Karen Heim, Clerk-Treasurer, Culver

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale

Carrie Mugford, Clerk-Treasurer, North Manchester

Jennifer Simmons, Chief Operating Officer, Aim

Dr. Chip Taylor, Institute Director, Ball State University

**Association of Public Treasurers of the United States and
Canada (APT)**

International Institute of Municipal Clerks (IIMC)

4:30 p.m. – 5:30 p.m.

**Institute Class – Meeting the Requirements of your
Community’s American Rescue Plan Act (ARPA) Funds**

Hendricks A & B

The American Rescue Plan Act provided direct, pandemic-era funding from the Federal government to states and all of our nation’s municipalities. While the funding was significant, with almost complete discretion regarding its use, there are many reporting, contracting, and spend-by requirements that must be met. Typically, failure to meet these requirements will come to light during the required Federal auditing process. Participating in this workshop will allow you to use your ARPA funds with confidence.

Speakers:

Chris Brunner, Senior Consultant, Baker Tilly

Campbell Ricci, Policy Director, Aim

4:30 p.m. – 5:30 p.m.

Academy Class – Workforce Development

Hendricks D & E

Having a skilled workforce isn’t just good for your employment needs, it’s good for your community, your county, and the state. This workshop will discuss strategies, including services and grant programs, that you can implement to build talent in your city or town. Collaborations

with educational institutions, businesses, and community organizations will also be touched on.

Speaker:

Bill Brown Assistant Director for Strategy and Engagement,
Environmental Resilience Institute

7:00 p.m. – 9:00 p.m.

Institute & Academy Class – Fool Me Once Fraud Experience

Sponsored by LWG CPAs & Advisors

Hendricks A & B

Kelly Richmond Pope is back with an insightful and entertaining way to examine public fraud and help participants put themselves in the shoes of both perpetrators and whistleblowers. Find out where you fit in through her interactive game, Fool Me Once Fraud Experience.

Speakers:

Jim Higgins, Partner, LWG CPAs & Advisors

Kelly Richmond Pope, Author and Producer, “All the Queen’s Horses”

Wednesday, March 20

**afternoon snacks provided*

7:30 a.m. – 8:00 a.m.

Registration

Prefunction A

7:30 a.m. – 8:00 a.m.

Breakfast

Hendricks C

8:00 a.m. – 10:00 a.m.

Institute & Academy Class – Mastering Effective Time Management Strategies

Hendricks A & B

Ensuring you remain in control of your schedule and your space can be as simple as finding the right organizational tools or as tough as setting more effective boundaries.

Regardless of where you fall on this spectrum, having systems in place is critical. And once you have those strategies, how can you organize your office to control and systematize the endless amounts of paper and send a confident message that you are a good steward of both public and private information. Attendees of this workshop will learn tips, tricks, and more to help with effective time management, becoming organized, and most importantly, maintaining the systems established.

Speakers:

Janet Alexander, Local Government Services

Suzy Bass, Local Government Services

Nicole Bolden, City Clerk, Bloomington

Erin Jamison-Koenig, Communications Director, Aim

Shari Johnson, Clerk-Treasurer, Advance

Erica Lyden-Giger, Clerk-Treasurer, Prince's Lakes

Cindy Poore, Director of Finance and Records, Zionsville

10:00 a.m. – 11:00 a.m. **Institute & Academy Class – Indiana Office of Technology and Cybertrack Cybersecurity Assessment Program: You Need to Hear This!**

Hendricks A & B

Helping cities and towns assess their vulnerabilities and provide them with meaningful and actionable guidance is the mission of Cybertrack Cybersecurity Assessment Program. This cost-free program, a joint effort through IU and Purdue, is the perfect companion topic with the resources offered by the state of Indiana's Office of Technology. IOT provides secure, low-cost .gov websites and email addresses, along with an increasing amount of computer hardware, capitalizing on the buying power of the state. This is one of those workshops you can't afford to miss!

Speakers:

Joe Beckman, Assistant Director, cyberTAP

Gideon Bower, Local Government Program Operations Director, Indiana Office of Technology

11:00 a.m. – 12:15 p.m. **Luncheon**
Hendricks C

12:30 p.m. – 2:30 p.m. **Institute & Academy Class – Unmasking Cyber Fraud: Criminal Trends and Strategies for Combating Them**
Hendricks A & B

In this presentation, we will delve into the ever-evolving world of cyber fraud, examining the latest criminal trends that plague our digital landscape. We'll dissect the ingenious techniques employed by cybercriminals, from business e-mail compromise to ransomware attacks, shedding light on their tactics and targets. Equally important, we will explore proactive measures to combat these threats effectively. From cybersecurity protocols to user education, we'll reveal strategies that empower individuals and organizations to safeguard their digital assets. Real-world case studies and actionable insights will equip attendees with the knowledge needed to navigate the treacherous waters of cybercrime prevention.

Speaker:

Jeffrey Adams, Special Agent in Charge, U.S. Secret Service – Indianapolis Field Office

2:30 p.m. – 3:30 p.m. **Institute Class – Name that Revenue! (Tax Structure)**
Hendricks A & B

What are all these deposits I keep getting from the state comptroller and county auditor? What funds can I use to pay for various projects? Learn all about your revenues and how you can spend them in this class!

Speaker:

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

2:30 p.m. – 3:30 p.m.

Academy Class – Understanding and Reducing Stress

Hendricks D & E

Statistics show that none of us are strangers to stress. A recent study by The American Psychological Association reports that 24% of adults classify their average stress level to be between 8–10 on a scale of 1–10. As masters of our craft and leaders in our field, we all carry a heavy load in our professional lives. Add in juggling a personal life, and we all feel the anxiety and fatigue from perpetual stress. Join us as we work through common stressors, coping strategies, and realistic ways to regain control for a healthier, more balanced you.

Speakers:

Karen Heim, Clerk-Treasurer, Culver

Kayla Pauley, Clerk-Treasurer, Cromwell

3:30 p.m. – 5:30 p.m.

Institute & Academy Class – All Matters HR: What Every Clerk-Treasurer Should Know and Understand about Human Resources

Hendricks A & B

This session will focus on the day-to-day things that Clerks and Clerk-Treasurers need to know with regards to human resources and managing employees. Job postings, interviews, on-boarding, digging into the all-important acronyms of FMLA and FLSA, barely scratch the surface of this critical workshop. This must-do session is critical for both new and veteran officials to ensure they have the very latest HR information to avoid making embarrassing missteps in this complicated field.

Speaker:

Kristen Deutsch, President, New Focus HR, LLC

Thursday, March 21

7:30 a.m. – 8:00 a.m.

Registration
Prefunction A

7:30 a.m. – 8:00 a.m.

Breakfast
Hendricks C

8:00 a.m. – 9:00 a.m.

Institute & Academy Class – Understanding the Legislative Process, Working with Lawmakers, and Collaborating with State Officials
Hendricks A & B

If you don't spend much time inside the Indiana Statehouse, the legislative process can be daunting. Aim's government affairs director will give participants a quick refresher on the Indiana General Assembly, offer some detailed advice for building trusting relationships with legislators, and review key bills impacting clerks and clerk-treasurers.

Speaker:

Jenna Bentley, Government Affairs Director, Aim

9:00 a.m. – 11:00 a.m.

Institute Class – Nuts & Bolts: Part 2 (Payroll)
Hendricks A & B

Employees are one of your municipality's most valuable resources and you want to make sure they are being paid correctly and on time. Furthermore, you also want to make sure payroll taxes, retirement, and other withholdings are dealt with appropriately. This class will look at the payroll process from start to finish, including following salary ordinances, planning for 27 pays, timesheets, issuing pay checks, paying the IRS and the State of Indiana, and any other reporting that needs to be completed. Included will be annual duties such as W2s, 1099s, and TCC.

Speakers:

Karen Heim, Clerk-Treasurer, Culver

Madalyn Sade-Bartl, Clerk-Treasurer, Churubusco

Miriah Tobias, Deputy Clerk-Treasurer, North Manchester

9:00 a.m. – 10:00 a.m.

Academy Class – Maintaining a Positive Attitude and Being your Community’s Biggest Fan

Hendricks D & E

Former Sullivan Mayor and Sullivan’s all-time Supporter-in-Chief Clint Lamb is known for his optimistic approach to governing. Clint will offer insights on how to maintain a positive outlook and send a message to your community that you can and will do hard things in the quest to create the kind of town or city worthy of the name. This fun session will offer tangible examples of what great things can happen when you focus on building up community pride with the same intensity as building with bricks and mortar.

Speaker:

Clint Lamb, Field Services Manager, Aim

10:00 a.m. – 11:00 a.m.

Academy Class – Preview of Positive Pay

Hendricks D & E

Before you can determine if a positive pay program is right for your community, first you need to know exactly what it means! Thanks to evolving technology, you can do some sleuthing through your many financial institutions to upload checks, verify payees, clear the check number, and ensure available funds. This will help thwart fraud and save time and money by tracking down declined payments.

Speakers:

Katie Aeschliman, Senior Vice President-Director, BMO Commercial Bank, BMO Bank, N.A.

Terri Budde, Clerk-Treasurer, Remington

Kristie Klein, Deputy Clerk-Treasurer, Schererville

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

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:

Karen Heim, Clerk-Treasurer, Culver

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale