



29th Annual ILMCT Institute & Academy

March 17-21, 2024 | Plainfield, IN



SEE YOU IN PLAINFIELD!

Join us in Plainfield for the 29th Annual ILMCT Institute & Academy where you will spend the week diving into topics focused specifically on the role of the municipal clerk and clerk-treasurer. Attend an abundant lineup of classes for both the novice and advanced municipal official, targeting the subjects necessary for you to grow in your profession. Network with your colleagues and learn from their experiences, while gathering the tools you need to be a powerful part of your local government team.

Sunday, March 17	
2:00 p.m. – 6:00 p.m.	Registration
2:00 p.m. – 2:45 p.m.	Meet & Greet
3:00 p.m. – 4:00 p.m.	Welcome & Opening Session
4:00 p.m. – 5:00 p.m.	Institute & Academy Class – Get to Know the Indiana Law Enforcement Academy (ILEA)
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?
6:30 p.m.	Breaking the Ice with Pizza
Monday, March 18	
7:30 a.m. – 8:00 a.m.	Registration & Breakfast
8:00 a.m. – 4:00 p.m.	State Board of Accounts Resource Center
8:00 a.m. – 9:00 a.m.	Institute Class – Trash or Treasurer: Retention, Preservation, and Disposal of Records
8:00 a.m. – 9:00 a.m.	Academy Class – INPRS Audits
9:00 a.m. – 11:00 a.m.	Institute Class – Nuts & Bolts: Part 1
9:00 a.m. – 11:00 a.m.	Academy Class – High Stakes: Revenues from Charitable and Casino Gaming, and Risk Mitigation for Special Events
11:00 a.m. – 12:15 p.m.	Luncheon – Municipal Swag Swap and Q&A
12:30 p.m. – 2:30 p.m.	Institute & Academy Class – Getting to Know the State Board of Accounts
2:30 p.m. – 5:00 p.m.	Institute & Academy Class – Traditional and Social Media Transparency and Best Practices
7:00 p.m. – 9:00 p.m.	Networking Reception <i>Sponsored by Boyce Systems</i>
Tuesday, March 19	
7:30 a.m. – 8:00 a.m.	Registration & Breakfast
8:00 a.m. – 10:00 a.m.	Institute & Academy Class – Robust Internal Controls Send a Message of Sound Management and Competency
10:00 a.m. – 12:00 p.m.	Institute & Academy Class – Becoming a Rockstar
12:00 p.m. – 1:15 p.m.	Luncheon
1:30 p.m. – 2:30 p.m.	Institute & Academy Class – Public Speaking

Tuesday, March 19 (continued)	
2:30 p.m. – 4:30 p.m.	Institute & Academy Class – Certifications: ILMCT, Aim, IIMC, and APT
4:30 p.m. – 5:30 p.m.	Institute Class – Meeting the Requirements of your Community's American Rescue Plan Act (ARPA) Funds
4:30 p.m. – 5:30 p.m.	Academy Class – Workforce Development
7:00 p.m. – 9:00 p.m.	Institute & Academy Class – ILMCT Institute & Academy Presents Fool Me Once Fraud Experience with Kelly Richmond Pope <i>Sponsored by LWG CPAs & Advisors</i>
Wednesday, March 20	
7:30 a.m. – 8:00 a.m.	Registration & Breakfast
8:00 a.m. – 10:00 a.m.	Institute & Academy Class – Mastering Effective Time Management Strategies
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!
11:00 a.m. – 12:15 p.m.	Luncheon
12:30 p.m. – 2:30 p.m.	Institute & Academy Class – Unmasking Cyber Fraud: Criminal Trends and Strategies for Combating Them
2:30 p.m. – 3:30 p.m.	Institute Class – Name that Revenue (Tax Structure)
2:30 p.m. – 3:30 p.m.	Academy Class – Understanding and Reducing Stress
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
Thursday, March 21	
7:30 a.m. – 8:00 a.m.	Registration & Breakfast
8:00 a.m. – 9:00 a.m.	Institute & Academy Class – Understanding the Legislative Process, Working with Lawmakers, and Collaborating with State Officials
9:00 a.m. – 11:00 a.m.	Institute Class – Nuts & Bolts: Part 2 (Payroll)
9:00 a.m. – 10:00 a.m.	Academy Class – Maintaining a Positive Attitude and Being your Community's Biggest Fan
10:00 a.m. – 11:00 a.m.	Academy Class – Preview of Positive Pay
11:00 a.m. – 12:00 p.m.	Wrap-Up Closing Session Q&A



BALL STATE UNIVERSITY

Institute & Academy

ILMCT and Ball State University have been partners for decades. Our ongoing collaboration to provide Hoosier clerks and clerk-treasurers with quality continuing education through the ILMCT Institute & Academy is going strong. This partnership, when coupled with a strong partnership with the International Institute for Municipal Clerks, ILMCT Institute & Academy is better than ever!

What is the difference between the Institute & Academy?

Certified Municipal Clerk (CMC) / Institute – The CMC program is designed to enhance the job performance of the clerk, clerk-treasurer, controller, and deputy clerk. To earn the CMC designation, attendance in an extensive education program is required. Institute classes are designed to equip attendees with the basic skills needed to perform the duties of their office, based on the International Institute of Municipal Clerks (IIMC) core curriculum. **These classes are also designed for those pursuing their Indiana Accredited Municipal Clerk (IAMC) designation through ILMCT.**

Master Municipal Clerk (MMC) / Academy – The MMC program is an advanced continuing education program that prepares participants to perform complex municipal duties. The program has an extensive and rigorous educational component and a professional and social contribution component. The MMC applicant must demonstrate that they have actively pursued education and professional activities. Academy classes are deemed appropriate for those working towards their MMC designation. More information on the IIMC programs can be found at iimc.com.

Additionally, both Institute and Academy classes can be used toward the Certified Public Finance Administrator (CPFA) designation offered through the Association of Public Treasurers of the United States and Canada. More information can be found at aptusc.org.

EDUCATIONAL SESSIONS

Sunday, March 17

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

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.

Sunday, March 17 (continued)

The Indiana Utility Regulatory Commission: What is it? Who needs to know? What is required? (Institute & Academy)

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.

Monday, March 18**Trash or Treasure: Retention, Preservation, and Disposal of Records**

(Institute)

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.

INPRS Audits

(Academy)

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.

Nuts & Bolts: Part 1

(Institute)

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.

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

(Academy)

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 learn best practices relative to the accounting of these non-traditional revenues, as well as risk mitigation steps you need to understand before planning your next event.

Getting to Know the State Board of Accounts

(Institute & Academy)

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.

Traditional and Social Media Transparency and Best Practices

(Institute & Academy)

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 a member of the media 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.

Tuesday, March 19**Robust Internal Controls Send a Message of Sound Management and Competency**

(Institute & Academy)

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.

Becoming a Rockstar

(Institute & Academy)

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.

Public Speaking

(Institute & Academy)

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.

Certifications: ILMCT, Aim, IIMC, and APT

(Institute & Academy)

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.

Meeting the Requirements of your Community's American Rescue Plan Act (ARPA) Funds

(Institute)

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.

Workforce Development

(Academy)

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.

Tuesday, March 19 (continued)**Fool Me Once Fraud Experience**

(Institute & Academy)

Sponsored by LWG CPAs & Advisors

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.

Wednesday, March 20**Mastering Effective Time Management Strategies**

(Institute & Academy)

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.

Indiana Office of Technology and Cybertrack Cybersecurity Assessment Program: You Need to Hear This!

(Institute & Academy)

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!

Unmasking Cyber Fraud: Criminal Trends and Strategies for Combating Them

(Institute & Academy)

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.

Name that Revenue! (Tax Structure)

(Institute)

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!

Understanding and Reducing Stress

(Academy)

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.

Wednesday, March 20 (continued)**All Matters HR: What Every Clerk-Treasurer Should Know and Understand about Human Resources**

(Institute & Academy)

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.

Thursday, March 21**Understanding the Legislative Process, Working with Lawmakers, and Collaborating with State Officials**

(Institute & Academy)

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.

Nuts & Bolts: Part 2 (Payroll)

(Institute)

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.

Maintaining a Positive Attitude and Being your Community's Biggest Fan

(Academy)

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.

Preview of Positive Pay

(Academy)

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.

Wrap-Up Closing Session Q&A

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.



Event Center

Embassy Suites by Hilton
Plainfield Indianapolis Airport
2353 Perry Road
Plainfield, IN 46168

Hotel

Embassy Suites by Hilton
Plainfield Indianapolis Airport
6089 Clarks Creek Road
Plainfield, IN 46168
(800) 362-2779

Room Rate: \$172 per night (plus tax)

Online booking link can be found at aimindiana.org/ilmct.



The hotel is connected by indoor walkway to the Event Center. Please contact the Embassy directly to make your hotel reservation. Request Group Name 2024 ILMCT Institute & Academy to receive the special rate of \$172 per night (plus tax). Reservations must be made by **Friday, February 22** to receive the ILMCT rate. ILMCT is not responsible for hotel reservations or cancellations.

Parking

Parking is complimentary.

Meals

Included with your registration fee, continental breakfast will be provided Monday through Thursday and lunch will be provided Monday through Wednesday. Pizza will be served on Sunday evening following class. Monday and Wednesday nights are open for conference attendees to explore Plainfield.

Conference Attire

Business casual attire is suggested for this event. Event room temperature may vary beyond ILMCT control; please wear layers of clothing for your comfort.

Meeting Materials

Please provide your email address on your registration form. Meeting materials will be emailed to attendees prior to the event via Dropbox. Printed copies will not be available onsite. Please print copies or save files to your device prior to your arrival. Wifi is complimentary. Power outlets may be limited. Bring your device fully charged to the event each day.

Special Needs

We want to make all events accessible to you. If you require special arrangements or a special diet, please notify us on your registration form. We may not be able to accommodate such requests the day of the event.

Late Registrations

Registrations received after March 8, including onsite registrations, will be subject to a late fee of \$25.

Cancellation Policy

Written cancellation received on or before March 8 will be refunded less a \$50 administrative fee. Cancellations should be faxed to (317) 237-6206 or sent to bbystry@aimindiana.org. No refunds after March 8.



ILMCT
125 W. Market Street, Suite 100
Indianapolis, IN 46204

