



AGENDA

March 16–20, 2025

Embassy Suites by Hilton Plainfield Indianapolis Airport
Plainfield, Indiana

Sunday, March 16

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| 8:00 a.m. – 3:00 p.m. | Athenian Dialogue – The Energy Bus
<i>Separate pre-registration required</i>
<i>Hadley Ballroom</i> |
| 2:00 p.m. – 6:00 p.m. | Registration
<i>Prefunction A</i> |
| 3:00 p.m. – 4:00 p.m. | Welcome & Opening Session
<i>Hendricks A & B</i> |

This important kick-off session will begin with welcoming remarks from key community and ILMCT leaders, and attendees will learn what to expect at the conference, meet

new colleagues, 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:

Nicole Bolden, City Clerk, Bloomington

Robin Brandgard, Council Member, Plainfield

Kyle Johnson, Director (VP) of Marketing Strategy, Visit Hendricks County

Vicki Kitchen, Clerk-Treasurer, North Liberty

Cindy Morrison, Clerk-Treasurer, Dale

Mark Todisco, Town Clerk, Plainfield

4:00 p.m. – 5:00 p.m.

Institute & Academy Class – Panel with Newly Appointed State Agency Leaders

Hendricks A & B

Following the inauguration of Mike Braun, most state agencies will experience some transition. ILMCT will invite new leaders whose work will impact municipalities to introduce themselves and share a few words about any changes they expect to make in the coming months and years.

Moderator:

Jennifer Simmons, Chief Operating Officer, Aim

Speakers:

Mark Doud, Director of Governmental Affairs, Office of Governor

Cory Grass, Government Affairs Director, Office of the Lt. Governor

Jim Johnson, Intergovernmental Affairs Director, Indiana Department of Transportation

Paul Joyce, State Examiner, State Board of Accounts

5:00 p.m. – 6:00 p.m. **Institute & Academy Class – Public Purchasing Requirements and Strategies**

Hendricks A & B

Local governments are subject to many rules and procedures designed to make the bidding purchasing processes transparent, fair, and economical. Attendees of this course will receive vital information to ensure they have the foundation and advanced best practices to employ a procurement program that exceeds expectations.

Speaker:

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

6:30 p.m. – 8:30 p.m. **Breaking the Ice – Trivia**

Hendricks A&B

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

Monday, March 17

**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 & Academy Class – Language Matters**
Hendricks A & B

This workshop aims to raise awareness of cultural differences and equip attendees with effective strategies for communication and relationship building across different nationalities. The focus will be on understanding cultural norms, communication styles, and how diverse cultural backgrounds impact workforce dynamics. Additionally, the session will highlight key findings regarding workforce diversity and the role of technology.

Speaker:

Lucas Fonseca, Chief Executive Officer, Language Matters

9:00 a.m. – 11:00 a.m. **Institute & Academy Class – Interpersonal Relationships**
Hendricks A & B

With clear understanding comes the ability to communicate, work, accomplish goals, and resolve conflicts along the way. The goal during this workshop is to uncover insights about oneself and how to react and work with others. The presenters will be touching on various personality assessments as well as assessments on how to respond to expectations. Understanding yourself better first and then learning to observe and recognize traits around you will help you become more successful professionally and personally.

Speakers:

Karen Heim, Clerk–Treasurer, Culver

Kayla Pauley, Clerk–Treasurer, Cromwell

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

During this casual mealtime, decompress and seek out answers to any questions about the League. Or take a few

minutes to drop a concern or question in the Questions Box at the registration desk!

12:30 p.m. – 2:00 p.m.

Institute & Academy Class – Walk Through an Audit with the State Board of Accounts

Hendricks A & B

The State Board of Accounts will discuss the various components of an audit. Starting first with their determination of the engagement type auditees will receive. Then, the duo will transition to what occurs during an audit and what the SBOA expects from the auditee once the engagement concludes.

Speakers:

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

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

2:00 p.m. – 3:30 p.m.

Institute & Academy Class – State Board of Accounts Highlights Common Audit Findings

Hendricks A & B

Building on their first presentation regarding the audit process, the representatives from the State Board of Accounts will discuss some of the most common audit findings. They will expand on these findings as to how auditees can ensure they are complying to avoid potentially receiving similar findings. Time permitting, speakers will address some of their most frequently asked audit questions.

Speakers:

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

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

3:30 p.m. – 5:00 p.m. **Institute & Academy Class – The Family and Medical Leave Act: Basic Employer Guide and Resources**
Hendricks A & B

If your municipality is looking to better understand the federal Family and Medical Leave Act (FMLA), presenters will help attendees understand how FMLA impacts a municipality. Discussions will cover expectations for both the employer and employee. Attendees will learn answers to questions like which employees are covered, what is a qualifying event, how much time off are you legally required to provide, and when must an employer notify their employees.

Speakers:

Melissa McDuffey, HR/Benefit Consultant, American Fidelity
Kathleen Weisenbach, District Manager, American Fidelity

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

Tuesday, 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. **Aim Field Services Help Desk**
Prefunction B

8:00 a.m. – 10:00 a.m. **Institute & Academy Class – Workers’ Compensation Coverage for Municipal Employees: Coverage, Classifications, Premium Calculations, and the Audit Process**

Hendricks A & B

This two-hour workshop is tailored for municipal officials, employees, and administrators, who are responsible for understanding and managing workers’ compensation within the public sector. This session provides a deep dive into the unique aspects of workers’ compensation coverage for municipal employees, focusing on classifications, premium calculations, and the premium audit process. Participants will gain a clearer understanding of how workers’ compensation works specifically for municipal entities and learn best practices for all things workers’ compensation related.

Speaker:

Bob Davidson, Vice President of Employee Benefits, Indiana Public Employers Plan, Inc. (IPEP)

10:00 a.m. – 11:30 a.m. **Institute & Academy Class – Everything you Wanted to Know about AI but are Afraid to Ask**

Hendricks A & B

Artificial Intelligence (AI) is no longer a concept confined to science fiction – it is shaping our present and future in ways both exhilarating and unsettling. This workshop will unravel the complexities of AI by exploring its origins, its current state, and the risks and challenges it introduces to our world.

Speaker:

Greg Prost, Chief Investment Officer, Robinson Capital Management

11:30 a.m. – 12:45 p.m. **Luncheon**

Hendricks C

1:00 p.m. – 2:30 p.m.

Institute & Academy Class – Overcoming the Fear of Using AI in the Public Space

Hendricks A & B

AI is transforming every facet of our lives, yet many people still feel intimidated or uncertain about incorporating it into their daily routines, particularly in public and professional spaces. The workshop will help attendees overcome their fears and gain confidence in using AI tools effectively. Through practical examples, the presenter will explore how AI can enhance innovation in the workplace, while also discussing potential future challenges and how to stay ahead of the curve.

Speaker:

Greg Prost, Chief Investment Officer, Robinson Capital Management

2:30 p.m. – 3:30 p.m.

Institute & Academy Class – Understanding Legislative Relationships, Following Statehouse News, and Knowing When and How to use your Voice

Hendricks A & B

This annual course always has a new twist! This year, members of the Aim legislative team will be on hand to discuss major happenings at the statehouse as the long legislative session ends. Also, schedule permitting, we'll hear from lawmakers first-hand how they believe clerks and clerk-treasurers can affect change through communication with their legislators.

Speakers:

Isabel Elliott, Government Affairs Manager, Aim
Amy Krieg, Government Affairs Director, Aim

3:30 p.m. – 4:30 p.m.

Institute & Academy Class – Streaming and Archiving Public Meetings

Hendricks A & B

The law requiring streaming and archiving certain public meetings is nearly in effect. Speakers will review the requirements to ensure attendees are ready to flip the “on” switch, if they haven’t already. Also, we’ll hear from a fellow Clerk–Treasurer about their experience, and you’ll be glad to learn, it doesn’t have to be a costly or difficult process. What are the low-cost streaming options? Can you host meetings exclusively online? How are you preserving these recordings? These questions and more will be answered in this critical workshop!

Speakers:

Karen Heim, Clerk–Treasurer, Culver

Becca McCuaig, Chief Legal Counsel, Aim

4:30 p.m. – 5:30 p.m.

Institute & Academy Class – Using State Revolving Fund to Improve Invisible Infrastructure and Achieve Compliance

Hendricks A & B

Building out and maintaining vital infrastructure is a core service of municipal government. However, infrastructure, especially that which is underground, is extremely costly to construct and sustain. This workshop will review the various funding options out there to assist with keeping the backbone of our communities in good, healthy, working order. We’ll also discuss the new federal requirements for replacing lead service lines and monitoring water loss that every community leader needs to understand.

Speakers:

Stephanie Cerling, Project Manager, DLZ Indiana

Mitchell Eschweiler, Director, Baker Tilly Municipal Advisors

Alex Hilt, SRF Director of Finance, Indiana Finance Authority

Samantha Smerika-Rouhselang, Project Manager, DLZ
Indiana

7:00 p.m. – 9:00 p.m.

Institute & Academy Class – Know your Stuff: Don't Jeopardize your Community's Reputation

*Sponsored by LWG CPAs & Advisors
Hendricks A & B*

This is Jeopardy! In this interactive, high-energy workshop, attendees will sharpen their knowledge of essential municipal topics while engaging in a fun and competitive game show format inspired by Jeopardy. This two-hour session will not only help participants deepen their understanding of key issues affecting their communities but also promote better decision-making in local government. Divided into teams, participant will answer important municipal questions across categories such as Taxes, Succession Planning, American Rescue Plan Act (ARPA), and more. What's the goal? Equip everyone with the tools and knowledge to avoid jeopardizing their community's reputation through informed decision-making and strong governance.

Speaker:

Jim Higgins, Partner, LWG CPAs & Advisors

Wednesday, 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. – 9:00 a.m.

Institute Class – Managing Municipal Capital Assets

Hendricks A & B

This course equips clerks with essential knowledge to oversee and maintain city or town’s capital assets, including buildings, infrastructure, and equipment. Participants will learn strategies for inventory management, budgeting for asset maintenance, and knowing when long-term replacements or upgrades will be necessary. The course emphasizes legal compliance, effective record-keeping, and coordination with others to ensure the municipality’s assets are managed efficiently and sustainably. By the end of the course, participants will be prepared to support strategic asset management that maximizes community value and minimizes costs.

Speaker:

Bob Reynolds, Principal, LWG CPAs & Advisors

8:00 a.m. – 9:00 a.m.

Academy Class – Strengthen your Leadership Skills through Honing your Writing Techniques

Hendricks D & E

As a leader in your community, you need to learn compelling and impactful written communications skills for a variety of audiences, including constituents, colleagues, and stakeholders. Participants in this fast-paced class will explore techniques for presenting clear arguments, addressing diverse perspectives, and using evidence to build credibility and trust. By the end of the class, leaders will feel confident in their ability to influence decisions and drive action through persuasive and effective written communication.

Speaker:

Katherine Greene, Director, The Digital Writing Studio
Assistant Teaching Professor of The Writing Program, Ball
State University

9:00 a.m. – 11:00 a.m.

**Institute Class – Budgeting Basics and Important Tips for
Managing your Budget Year Round**

Hendricks A & B

Following a quick budget-making refresher, our expert speaker will lead the group through what happens after the budget passes, how to manage and monitor spending to stay on track, and best practices to make next year's budget an easier, more efficient exercise.

Speakers:

Scott Finley, Manager, Baker Tilly Municipal Advisors
Paige Sansone, Principal, Baker Tilly Municipal Advisors

9:00 a.m. – 11:00 a.m.

**Academy Class – Advanced Budgeting and Post-Budgeting
Skills**

Hendricks D & E

For those well-versed in budgeting best practices, there is still more to learn! Once the budget is passed there is the 1782 Notice, sometimes an excess levy appeal, and understanding how the county budget and county-based property tax appeals come into play. And there is the need to plan ahead and think long-term about your community's financing. Join this class where our municipal finance expert and veteran Clerk-Treasurer team up to bring you these topics and more during this advanced budgeting course.

Speakers:

Ross Hagen, Director, Baker Tilly Municipal Advisors
Carrie Mugford, Clerk-Treasurer, North Manchester

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

12:30 p.m. – 2:30 p.m. **Institute Class – Gateway to Knowledge: How to Find Data in Familiar Places**
Hendricks A & B

You know Gateway and what you are required to put into the portal. But do you know all of the data you can retrieve? Do you know the many other data sources out there you can call upon to help you make more informed decisions? This workshop will explore useful data hubs and how this knowledge is right at your fingertips.

Speaker:

Josh Jacoboski, Data Analysis and Information Systems Director, Department of Local Government Finance (DLGF)

12:30 p.m. – 2:30 p.m. **Academy Class – Case Studies: What can we Learn from the Audits of Others?**
Hendricks D & E

It's tough to watch any of your colleagues' struggle through a tough audit. But once the dust settles, what can be learned from their experience? We'll explore the findings of a recent audit and use this as a jumping off point for a deep dive into effectively communicating with your team and fellow elected leaders in the best interest of your city or town.

Speakers:

Clint Lamb, Field Services Manager, Aim

Chou-il Lee, Partner, Taft Law

2:30 p.m. – 3:30 p.m. **Institute Class – Americans with Disabilities Act Compliance**
Hendricks A & B

Safe streets, easy access, a transparent government, these are just a few expectations we have of our municipalities.

While for most of us, these things mean the same thing. However, for those with disabilities, they mean so much more. What questions should you be asking about your community and ADA compliance? Where do you go for answers? And how do you ensure your community is a welcome place for all abilities?

Speakers:

Cecilia Coble, Council Member, Fishers

Cathy Gross, Aim

Ben Merida, Clerk-Treasurer, Martinsville

Mark Todisco, Town Clerk, Plainfield

2:30 p.m. – 3:30 p.m.

Academy Class – Understanding Credit Rating Agencies and Municipal Debt

Hendricks D & E

This class will provide a comprehensive overview of credit rating agencies such as Moody's, S&P, and Fitch, and their critical role in evaluating the creditworthiness of municipalities issuing debt. Participants will learn how credit ratings are determined, what factors influence a municipality's rating, and how these ratings impact borrowing costs and investor confidence. The course highlights the benefits of maintaining a high credit rating, such as lower interest rates on bonds and increased market access for future debt issuance. Practical strategies for improving and preserving credit ratings will be discussed, along with the potential consequences of rating downgrades. Attendees will come away understanding the importance of credit ratings in municipal finance and how to work proactively to achieve favorable outcomes.

Speakers:

Tim Berry, Managing Director, Crowe LLP

Becca Zakowski, Manager, Crowe LLP

3:30 p.m. – 4:30 p.m.

Institute & Academy Class – Ethics for Municipal Officials and Employees

Hendricks A & B

This workshop will provide municipal officials and employees with the tools to navigate ethical challenges in public service. Participants will explore the principles of integrity, transparency, and accountability while learning how to identify and address conflicts of interest, misuse of resources, and other ethical dilemmas. Interactive scenarios and discussions will help attendees apply ethical decision-making frameworks to real-world situations in municipal governance. By the end of the workshop, participants will be better equipped to foster trust and uphold the highest standards of ethical conduct in their roles.

Speaker:

Stephen Unger, Partner, Bose McKinney & Evans LLP

4:30 p.m. – 5:30 p.m.

Institute & Academy Class – Tax Increment Financing Spending Plans and Reporting

Hendricks A & B

There are fewer municipal financing tools with as much transparency as revenues generated in Tax Increment Financing districts. In this workshop participants will receive a review of existing reporting requirements with a deep dive into the latest spending plan mandate and what was learned following the first submission in 2024.

Speakers:

Heidi Amspaugh, Principal, Baker Tilly Municipal Advisors
Sarah Correll, Associate, Ice Miller LLP

Thursday, March 20

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 – Effective Meeting Preparation and Documentation

Hendricks A & B

This course provides essential skills for preparing and documenting effective minutes for council meetings. Participants will learn best practices for notetaking, structuring meeting agendas, and ensuring clear, concise, and accurate minutes. The course also covers how to anticipate key discussions, manage time effectively, and handle sensitive topics in a professional manner. By the end, attendees will be equipped to facilitate smooth and productive council meetings through meticulous preparation and comprehensive documentation.

Speakers:

Terri Budde, Clerk–Treasurer, Remington

Beth McFadin Higgins, Attorney, McFadin Higgins & Folz, LLP

Carrie Mugford, Clerk–Treasurer, North Manchester

9:00 a.m. – 10:00 a.m.

Institute & Academy Class – Collecting, Reporting, and Paying Sales Tax

Hendricks A & B

Many are surprised to hear that municipal governments both collect and pay sales taxes. Sales taxes must be collected on things such as field rental, shelter and room rentals, and more. And just as we do as citizens, there are forms to be filed and these taxes are paid to the Indiana Department of Revenue. This workshop will discuss when sales taxes must be paid and collected, and when and how those funds will be transferred to the state. Join this workshop to avoid tax confusion!

Speaker:

Meme Anderson, Audit Training and Support Supervisor,
Indiana Department of Revenue

10:00 a.m. – 11:00 a.m. **Institute & Academy Class – Final Exam: What We've Learned**
Hendricks A & B

This will be the first final exam that leaves you energized, confident in all you've learned, and looking forward to next year's Institute & Academy! Join this session for a fun and advanced conference roundup that helps you pull it all together and digest the most important information from the week.

Speakers:

Karen Heim, Clerk–Treasurer, Culver
Kayla Pauley, Clerk–Treasurer, Cromwell

11:00 a.m. – 12:00 p.m. **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:

Nicole Bolden, City Clerk, Bloomington
Vicki Kitchen, Clerk–Treasurer, North Liberty
Cindy Morrison, Clerk–Treasurer, Dale