



## 23<sup>rd</sup> ANNUAL CLERK–TREASURERS SCHOOL

THURSDAY, MAY 14, 2026

### AGENDA

9:30 a.m. – 9:45 a.m.     **Welcome & Opening Remarks**  
**Matt Greller**, Chief Executive Officer, Aim

9:45 a.m. – 10:45 a.m.     **Workshop:** Navigating the Department of Local Government  
Finance Budget 2.0

Join us for an overview of the DLGF Budget 2.0, a simplified platform that streamlines budgeting for local governments. It reduces errors, integrates DLGF estimates, and compares historical data, with tailored budget forms for each unit of government. Cash flow analysis tools and SBOA financial report access help manage reserves. A statewide “sandbox” test in April 2026 lets officials practice with Pay 2026 data in a risk-free environment, ahead of the June 2026 Pay 2027 launch. This workshop will prepare you for a smooth transition to Budget 2.0.

10:50 a.m. – 10:55 a.m.     **Break**

10:55 a.m. – 11:40 a.m.     **Workshop:** Electronic Records Program

This workshop introduces the Indiana Archives and Records Administration’s (IARA) Electronic Records Program and its

role in helping state and local government employees address the unique challenges of electronic records management. Participants will learn about the guidance, policies, and standards developed to support best practices. The session highlights IARA's *Electronic Records Guidelines*, covering topics such as digitization, storage, email and social media records, file management, and proper deletion. Attendees will also review *A Guide to Responsible Records Destruction for State Agencies and County/Local Offices*, outlining lawful and accountable destruction procedures.

11:40 p.m. – 12:20 p.m. **Lunch Break**

12:20 p.m. – 1:05 p.m. **Workshop:** Due Diligence in Action – Mitigating Risk for Local Governments

Bliss McKnight, longtime corporate partner of Aim, will share some of the troubling trends in risk management and how communities can perform some due diligence to help protect themselves, and their taxpayers, from these high-dollar events.

1:10 p.m. – 1:15 p.m. **Break**

1:15 p.m. – 2:00 p.m. **Workshop:** Looking Close to Home for Grants

With state and federal funding reductions, as well as the state's restructuring of LIT, and various property tax reductions, grant funding has never been more important. This workshop will explore grant funding programs from Hoosier utilities and businesses with large Indiana footprints that could help your community complete important quality of place goals in these increasingly challenging fiscal environments.

2:05 p.m. – 2:50 p.m.

**Workshop: This is Municipal Government Trivia!**

**This is Municipal Government Trivia** is back! Join Host and Aim CEO Matt Greller, along with a fantastic panel, to test your knowledge and have some fun. This interactive workshop features engaging questions about local government, public services, records management, and Indiana municipal history. Designed for friendly competition, the session mixes education with entertainment in a fast-paced trivia format. Whether you're a seasoned municipal pro or new to local government, you'll walk away with new insights, knowledge, and maybe even some bragging rights!

2:55 p.m. – 3:00 p.m.

**Closing Remarks & Adjourn**