



23rd 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.

Speaker:

Anna Culy, Budget Division, Director, Department of Local Government Finance

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.

Speakers:

Kalita Lopez, Electronic Records Archivist, Indiana Archives and Records Administration

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

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.

Speakers:

Nicole Broch, Senior Account Executive, Bliss McKnight, Inc.

Nick Irmeger, Risk Management Specialist, Bliss McKnight, Inc.

Bob Woodard, Vice President–Marketing, Bliss McKnight, Inc.

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.

Speaker:

Joel Reuter, External Affairs Director, Indiana American Water

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!

Host:

Joe Thallemer, Field Services Manager, Aim

Panelists:

Kayla Pauley, Clerk-Treasurer, Cromwell

Greg Wright, City Controller, Greenwood

Evelyn Lees, City Clerk, Noblesville

Becca McCuaig, Chief Legal Officer, Aim

Scott Finley, Manager, Baker Tilly

2:55 p.m. – 3:00 p.m.

Closing Remarks & Adjourn