



Agenda
March 5-9, 2017
Horizon Convention Center
Muncie, Indiana

Sunday, March 5

3:00 p.m. – 4:00 p.m.

Registration

4:00 p.m. – 5:00 p.m.

Consolidation of LOITs into One Local Income Tax (CMC, MMC)

Delaware 2

In an effort to simplify Indiana’s income tax system, the General Assembly restructured three LOITs (CAGIT, COIT and CEDIT) in 2015. HEA 1485 merged these taxes into a single local income tax. The LIT, as it’s now known, has three rate components. Municipal budget leaders need to know about this significant transition that went into effect earlier this year. Attend this workshop to understand these changes to this vital municipal funding source.

Speakers:

Karen Arland, Of Counsel, Ice Miller LLP

Todd Samuelson, CPA, Executive Partner, Umbaugh

5:10 p.m. – 7:00 p.m.

Understanding Grassroots Legislative Advocacy and Real-time Updates from the 2017 Legislative Session (CMC, MMC)

Delaware 2

The Aim legislative team will walk participants through the importance, mechanics and strategies of grassroots lobbying. All elected and

appointed fiscal officers should know how and when to engage with lawmakers, both while in session and out. The workshop will close with a detailed briefing on municipal-related bills under consideration at the statehouse and what, if any, actions by ILMCT members are advised.

Speakers:

Brian Gould, Government Affairs Director, Aim
Jenna Knepper, Grassroots Legislative Advocate, Aim
Lindsey Moss, Assistant Government Affairs Director & Legislative Counsel, Aim

7:30 p.m.

Pizza at Courtyard

Conference Room AB

Monday, March 6

7:30 a.m. – 8:00 a.m.

Registration

Lobby

7:30 a.m. – 8:00 a.m.

Breakfast

Interurban Hall

8:00 a.m. – 12:00 p.m.

Dissecting Payroll and Related HR Matters (CMC)

Prairie Creek

Much hinges on getting your payroll done on-time and without error. Do you pay enough attention to the details when it comes to paying your employees? Are you calculating time, withholdings, and benefits accurately and in keeping with all recent regulatory and legal changes? What human resources issues do you need to consider in regards to payroll, overtime, and more? If you can't answer these questions with 100% confidence, you need this class!

Speakers:

Mary Jo "Joey" Lynch, IAMC, CMC, Clerk-Treasurer, Greendale
Madelyn Sade-Bartl, IAMC, Clerk-Treasurer, Churubusco

Taking Budgeting to the Next Level (MMC)

White River

Good budgeting requires more than just proper use of funds, compliance with a budget calendar and accurate completion of all appropriate forms. Once you've mastered the fundamentals, you're

ready for the next level of budgeting. It's time to learn some strategic and data driven approaches to reaching your goals. Participants in this course will work through a municipal budget and get specific instruction on how to use the budgeting process as a tool for advancing your community.

Speakers:

Jeff Messer, Director, Umbaugh Cash Advisory Services, LLC

Paige Sansone, CPA, Partner, Umbaugh

Eric Walsh, CPA, Partner, Umbaugh

12:00 p.m. – 1:00 p.m.

Luncheon

Interurban Hall

1:15 p.m. – 2:05 p.m.

Accounting Practices & Resources for Fiscal Officers (CMC)

Prairie Creek

Public service attracts individuals from all walks of life. Not all municipal fiscal officers possess a deep background in accounting. If you've found yourself in this position or if you think you need a refresher on the basics, attend this workshop. Participants will receive introductory accounting instruction, helpful tips and refreshers, and accounting resources to reference throughout the year as issues arise.

Speakers:

Kackie Chrapliwy, IAMC, CMC, Council Member, Walkerton

Retha Hicks, IAMC, MMC, Retha S. Hicks Consulting

Mary Jo "Joey" Lynch, IAMC, CMC, Clerk-Treasurer, Greendale

The Whole Package: Grants from A to Z (MMC)

White River

Solid grant application writing is an indispensable skill, but there is far more to grants than writing well or even obtaining the funds you seek. Once a grant is awarded there are crucial, and sometimes cumbersome, reporting and administrative requirements to consider. Understanding the process from beginning to end will help you be a better advocate for the community when acquiring and administering grants.

Speakers:

Greg Jones, Executive Director, Southern Indiana Development Commission

Madelyn Sade-Bartl, IAMC, Clerk-Treasurer, Churubusco

2:20 p.m. – 4:10 p.m.

Making the Most of Workplace Conflict (CMC & MMC)

Delaware 2

Everyone experiences conflicts in the workplace, even in the most friendly and productive environments. However, it is our initial reactions and long-term handling of conflicts that can promote successful outcomes from conflict. This interactive session will introduce participants to the types of conflict that occur in the workplace and provide tools and techniques for managing conflict toward positive outcomes. We will study and discuss several case-study scenarios and also gain experience through role-play. Participants will leave this workshop no longer fearful or intimidated by conflict, but confident in how best to successfully manage conflict to the benefit of their municipalities.

Speaker:

Jane Long, Director of Professional Development, International Institute of Municipal Clerks

6:00 p.m. – 9:00 p.m.

Monday Night Optional Activity – Scotty’s Brewhouse
Not Included in Registration Fee

Tuesday, March 7

7:30 a.m. – 8:00 a.m.

Registration

Lobby

7:30 a.m. – 8:00 a.m.

Breakfast

Interurban Hall

8:00 a.m. – 12:00 p.m.

Now, Therefore, Be it Resolved That You Need to Know About Municipal Resolutions, Ordinances and Codifications (CMC)

Prairie Creek

Are you communicating your municipality’s official rules and pronouncements effectively and in accordance with relevant legal guidelines? Do you know how to keep your books clear and clutter-free using appropriate codification techniques? As you likely know, the nuances between ordinances and codifications, and the procedures for their proper codification, are subtle but important. Attendees will leave this workshop with a strong appreciation for the technicalities of resolutions and ordinances.

Speakers:

Chou-il Lee, Of Counsel, Taft Stettinius & Hollister LLP

Joseph McDonough, Codification Consultant, American Legal Publishing Corporation
Daniel Taylor, Partner, Taylor, Chadd, Minnette, Schneider & Clutter, P.C.

What You Need to Know About Personnel Responsibilities (MMC)

White River

Comprehensive job descriptions, an updated and complete personnel manual, and a tested personnel evaluation program can save fiscal officers who wear many hats a great deal of time and frustration. They can also save a municipality a lot of money. This workshop will detail the components of a solid personnel management program and flag specific stumbling blocks to avoid. Attendees will also learn about some impactful personnel policies like uniforms, municipally funded mobile phones, and more.

Speakers:

Kristen Deutsch, President, New Focus HR, LLC
Sue Essman, Human Resources Director, Angola

12:00 p.m. – 1:00 p.m.

Luncheon

Interurban Hall

1:15 p.m. – 2:05 p.m.

Making Friends with Gateway (CMC)

Prairie Creek

Indiana’s mandatory budget and transparency portal has been in place since 2010. With the use of Gateway being expanded each year, understanding how to use the portal expertly and how to help your constituents access Gateway’s database will pay off in time-savings and peace of mind.

Speakers:

Vicki Kitchen, IAMC, MMC, Clerk-Treasurer, North Liberty
Tamara Runyon, IAMC, MMC, Clerk-Treasurer, Bluffton

TIF Establishment, Uses and Reporting Requirements (MMC)

White River

TIF is a vital tool for communities looking to make improvements to attract employers and workers alike. Along with the benefits of TIF comes the responsibility to accurately report information about TIF districts. Several longstanding reports, as well as the detailed reports

enacted in HEA 1290-2016, will be covered in this workshop designed for municipal fiscal officers.

Speaker:
Heidi Amspaugh, Principal, Umbaugh

2:20 p.m. – 4:10 p.m.

Internal Controls: An Overview, Best Practices and Lessons Learned (CMC & MMC)

Delaware 2

Over the past two years, following a strong state mandate, much time and intensity has been expended ensuring municipal officials and those who handle public funds exercise good judgement and sound practices to avoid mismanagement and fraud. It's time for a refresher course and a review of what's working, what's not, and how municipal fiscal officers can improve fiscal procedures in their communities.

Speakers:
Mark Adam, Crowe Horwath LLP
Tim Berry, Crowe Horwath LLP

6:00 p.m. – 8:00 p.m.

Dinner Class – Sound Banking Practices and Requirements (CMC & MMC)

Sponsored by London Witte Group LLC

Delaware 2

This after dinner conversation will review the requirements placed upon local governments in obtaining banking services and investing funds. Discussion topics will include the role of your local Board of Finance, the Indiana Public Deposit Insurance Fund and best practices in cash management and investing.

Speaker:
Jim Higgins, CPA, London Witte Group LLC

Wednesday, March 8

7:30 a.m. – 8:00 a.m.

Registration

Lobby

7:30 a.m. – 8:00 a.m.

Breakfast

Interurban Hall

8:10 a.m. – 10:00 a.m.

Disaster Response Accounting: Setting Your Community up Now for Reimbursement When the Time Comes (CMC & MMC)

Delaware 2

Getting hit with a significant natural disaster can be life-changing for the residents and businesses of any city or town, as well as for its municipal government. Getting hit a second time when expected FEMA reimbursement funds don't arrive is an even more devastating repeat blow. All fiscal officers should prepare now and understand what accounting and procedural practices must be used to ensure proper reimbursement of funds. The aftermath of a disaster, when resources are tight and stakes are high, is no time to get up to speed!

Speakers:

Carmen Goodman, Public Assistance Program Coordinator, Indiana Department of Homeland Security
Randy Morris, Controller, Kokomo

10:15 a.m. – 12:05 p.m.

Public Bidding - Start to Finish (CMC)

Prairie Creek

State law codifies extensive procedures regarding how and when to conduct public bidding and make selections on publicly bid projects. Are you following the law? If not, your community is exposed to significant liability. Fiscal officers will leave this workshop understanding the public bidding process from start to finish.

Speakers:

Karen Arland, Of Counsel, Ice Miller LLP
Lynda Dunbar, Clerk-Treasurer, Greencastle

Unlocking the Confusion around Capital Assets Accounting (MMC)

White River

Capital assets for local governments are different from what are typically described as fixed assets in the private sector. Are you aware of how to identify a capital asset and account for it properly? Have you dispelled all the myths regarding capital asset accounting as it applies to local units? It's time to master this complicated form of government accounting and correct any misunderstandings of the past. Attendees should come ready with questions and be eager to drill down!

Speakers:

Dan Hedden, CPA, Partner, Umbaugh
Deb Twitchell, IAMC, MMC, Clerk-Treasurer, Angola

12:05 p.m. – 1:15 p.m.

Luncheon

Interurban Hall

1:15 p.m. – 2:15 p.m.

Cybersecurity – Is your Community Protected? (CMC & MMC)

Delaware 2

Hacking, ransomware, malware, and bots or zombies are just a few cybersecurity terms you should become familiar with in your efforts to make your community's technology safe from thieves. Attendees will leave with a better understanding of where their networks are vulnerable, what to look for and how to defend their technology, and what to do in the event of an attack. Not a computer expert? That's ok. This workshop is designed just for clerks and clerk-treasurer's, not IT professionals.

Speaker:

Scott Blake, Territory Manager – IN/KY, SonicWALL, Inc.

2:30 p.m. – 4:20 p.m.

Feeling Confident with Your Presentation Skills (CMC)

Prairie Creek

All municipal officials are called upon to do a certain amount of public speaking and presenting before various bodies. Fiscal officers commonly do more such presenting than most public servants, yet not everyone becomes quickly accustomed to maintaining composure while in the spotlight. Attendees will gain valuable presentation skills that will help ensure they are prepared to convey information in the best manner possible.

Speaker:

Jennifer Simmons, Chief Operating Officer, Aim

Advanced Project Management Skills and Resources (MMC)

White River

Are you crazed with everything piling up on your desk while you try to complete a specific project? Attend this session to learn successful project management – how to create a plan, implement it, monitor progress, correct as necessary and deliver results. Take a helter-skelter race with disaster and turn it into an orderly list of objectives needing to be completed. Bring your planners and let's get organized!

Speaker:

Erin Jamison-Koenig, Communications Director, Aim

4:20 p.m.

Wednesday Night Optional Activity – Tonne Winery
Not Included in Registration Fee

Thursday, March 9

7:30 a.m. – 8:00 a.m.

Registration

Lobby

7:30 a.m. – 8:00 a.m.

Breakfast

Interurban Hall

8:10 a.m. – 10:00 a.m.

Professionalize Your Written Communications (CMC)

Prairie Creek

Written communication has become the primary method of communication in today's world. Yet, very few seek to improve their skills. This interactive workshop will help you improve writing skills such as organization, formatting, avoiding common grammar and spelling mistakes and editing. Participants will have the opportunity to work on documents they can use for future communication in the workplace.

Speaker:

Erin Jamison-Koenig, Communications Director, Aim

The Specifics of Selling and Buying Municipal Property (MMC)

White River

State law prescribes numerous processes by which a local unit can sell and buy property. A property's value often determines the proper process for its purchase. When buying property, are you getting the right number of appraisals and are your appraisers considered to be qualified under the law? Our expert will walk you through the processes from start to finish and boost your confidence that your community is on the right side of the sale.

Speakers:

Todd Caldwell, Director of Audit Services, State Board of Accounts

Susan Gordon, CPA, Director of Audit Services, State Board of Accounts

10:15 a.m. – 12:05 p.m.

When, Where and How: Taxes and your Municipality (CMC)

Prairie Creek

Although public entities are exempt from some taxes, there are still many we are responsible for paying, collecting and/or distributing appropriately. This workshop will clear up any tax confusion and help fiscal officers understand which taxes are paid by the municipality, withheld from employees, or collected from customers and constituents. Attendees will also learn of technology they can utilize and who they can contact when they have questions regarding the specific taxes.

Speaker:

Jim Higgins, CPA, London Witte Group LLC

Ethical Leadership for Clerks and Clerk-Treasurers (MMC)

White River

Over the years, many ethical dilemmas have been clarified through the enactment of state laws, thus reducing ambiguity. However, many ethical matters are still prescribed through state agency rulemaking, like INDOT's recent conflict of interest rule. Attendees of this workshop will get a thorough review of ethical laws, rules and best practices for local government fiscal officers.

Speakers:

Karen Arland, Of Counsel, Ice Miller LLP

Charles Taylor, Associate Professor, Department of Political Science and Managing Director, Bowen Center for Public Affairs, Ball State University

12:15 p.m. – 1:30 p.m.

Luncheon & Closing Program

Interurban Hall

Featured Speaker: Maureen Hayden, Director of Intergovernmental Relations, Office of Indiana Lieutenant Governor Suzanne Crouch