

Monday, September 25 Classes

SESSION "A" – 1:45 – 3:00 PM

EDUCATING YOUR COMMUNITY – PLAZA "A"

Do you frequently get the question – "What does a trustee do?" How many times have you been asked this question? This presentation will give you tools to promote and educate others on the essential services and efficiencies we provide.

Presented by: **Debbie Driskell** is serving her 27th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 12th year as the ITA Executive Director. She has worked to live out her passion to see others be the best they can be in a job that is vital to the fabric of our communities.

TOWNSHIP BOARD MEMBER TRAINING – SUITES 2/3

This presentation will include the unique insights from Indiana Senator Andy Zay who is a former township board member. The class will cover the basic duties and responsibilities of the township board.

Presented by:

Steve Buschmann - is an attorney with Thrasher Buschmann and Voelkel in Indianapolis and has been the attorney for the ITA for the past thirty years. Steve is considered state-wide to be proficient in township laws and acts as the township attorney for many townships across the state.

Senator Andy Zay - The 2017 legislative session is Andy Zay's first as an Indiana State Senator. Zay represents Senate District 17, which includes all of Wabash County and portions of Grant, Huntington and Whitley counties. In the Senate, Zay is a member of the Senate Committee on Agriculture; Senate Committee on Education and Career Development; Senate Committee on Insurance and Financial Institutions, and Senate Committee on Natural Resources.

STRESS: Manage the Menace – SUITES 4/5

Stress-the brain's normal response to life's demands-is experienced by all of us, and most of us are aware that living in a chronic state of elevated stress levels can wreak havoc on our minds and bodies. Symptoms and repercussions of stress can manifest cognitively, emotionally, physically, and/or behaviorally, and the damage to us personally-not to mention the ripple effect to others around us-can cost dearly. However, not all stress is bad! In this workshop, we will: understand the difference between good and bad stress, learn to recognize and address impending burnout and discover how to consistently and effectively manage the kind of stress that hurts us.

Presented by: **Kate Kunk**, R.N., CIRS-A/D, Caregiver Options Counselor for CICOA Aging & In-Home Solutions, coaches Hoosiers on a variety of topics related to optimizing quality of life. Kate has been a Case Manager for CICOA, for homeless shelters in New York City and Virginia's Roanoke Valley, and for a psychiatric clinic in Tennessee's Great Smoky Mountains. She also worked in the publishing industry for over three decades, during which time she wrote and developed educational materials for McGraw-Hill and Pearson in the New York Metropolitan area. Kate holds degrees in nursing and sociology, and certificates in gerontology and faith community nursing.

WHOSE BUSINESS IS THIS? IN PUBLIC ACCESS – SUITES 6/7

The Office of the Indiana Public Access Counselor ("PAC") provides advice and assistance regarding Indiana's public access laws, specifically the Access to Public Records Act ("APRA") and Open Door Law ("ODL") to members of the public, media, public officials and legislators. The PAC issues informal and formal opinions regarding questions and complaints about public access laws. This office works with both state agencies as well as local agencies. Luke will cover the laws pertaining to public records and meetings. He will give you information to prevent problems in your township. Geared to trustees AND Board Members.

Presented by – **Luke H. Britt** was appointed by Governor Mike Pence to serve as Indiana's Public Access Counselor in August of 2013, a non-partisan office dedicated to preserving the access rights of the public and educating government officials on their responsibilities under Indiana's access laws. Now the longest-serving PAC in state history, he previously served as an attorney and operations manager for the Indiana State Department of Health and as an attorney for the Indiana Department of Child Services after beginning his career in private practice in Johnson County, Indiana.

MONDAY, SESSION "A" CONTINUED

ARE YOU PREPARED FOR RETIREMENT? – SUITES 8/9/10

Whether you plan to retire next year or several years from now, you need to know what lies ahead with your benefits and how to get prepared NOW. The class is to be applicable to those close to retirement so that it includes deadlines and requirements to receive benefits, etc. However, it will be relevant to those who may be a ways out that want to know what to expect.

Presented by: This panel will include representatives from state & federal agencies:

Charo Boyd – is the Social Security Administration's (SSA) Public Affairs Specialist for the Indianapolis metropolitan and Southern Indiana area. She is responsible for informing the public about SSA programs and benefits. Boyd has been employed with SSA since 2002. She has worked as an Insurance Specialist in all areas of the Title II Program (Medicare, Retirement, Survivors, and Disability Insurance Benefits). Boyd has a B.S. in Psychology (Magna Cum Laude) and a M.S. in Guidance & Counseling with a concentration in clinical and organizational counseling all from Tennessee State University.

Lisa Anderson – has been with the Indiana Public Retirement System (INPRS) for over 7 years. With more than 20 years of experience in the retirement services industry, Lisa has worked extensively with plan members, helping them to invest, save, and plan for their financial futures. Lisa has also worked closely with employers, consulting on retirement plan design, compliance and conversions. A Colorado native, Lisa holds a Bachelors degree in Business from the University of Colorado and a Master's degree in Management from Regis University of Denver.

Todd Williams – is a Retirement Plan Advisor with Empower Retirement, the record keeper and educator to participants and eligible employees in the State of Indiana's Hoosier S.T.A.R.T. Deferred Compensation Plan. His responsibilities include marketing and outreach to Indiana's local government employers who are eligible to participate in the Plan, but may not fully understand its benefits. He has 11 years of experience in the retirement industry.

Bill Murphy – has served as the Executive Director for RIPEA – Retired Indiana Public Employees Association – since 1998. He will be sharing the benefits provided by RIPEA including the annual membership dues, who is eligible and why you should consider joining the Association.

CLERKS' ROUNDTABLES – SUITES 13/14

No matter what size of township you clerk, there will be place for you to discuss your challenges, experience and questions with fellow clerks.

Facilitated by:

Michelle Junkins – Adams Township - Sheridan (small-sized townships)

Heather Willman – Delaware Township - Fishers (Medium-sized townships)

Lynn McWhirter - Wayne Township - Indianapolis (Medium to Large-sized townships)

SESSION "B" – 3:15 – 4:30 PM

MERGING – WHEN DOES THIS MAKE SENSE? – PLAZA "A"

Have you ever wondered if merging is a good idea for your township and your neighbors? There are things you should know as you consider this option. The presentation will include plenty of time for your thoughts and questions.

Presented by:

Steve Buschmann - is an attorney with Thrasher Buschmann and Voelkel in Indianapolis and has been the attorney for the ITA for the past thirty years. Steve is considered state-wide to be proficient in township laws and acts as the township attorney for many townships across the state.

Debbie Driskell is serving her 27th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 12th year as the ITA Executive Director. She has worked to live out her passion to see others be the best they can be in a job that is vital to the fabric of our communities.

HELP ME FIND SOME MONEY for FIRE PROTECTION! – SUITES 2/3

Were you aware that there are funding sources beyond taxes to assist your township in providing fire protection? Do you know where to find them? What about funding for training? Join a career firefighter as he not only shares his experiences identifying alternative funding sources and taking advantage of them.

Presented by - Chief Brad Lucas is a 34 year veteran of the Seymour Fire Department. He served as a Firefighter, Code Enforcement Officer, and as a Battalion Chief prior to his appointment as Chief in April of 2011. His is active in Indiana's District 8 Planning and Training councils, Chairman of the Jackson county LEPC, as well as many service organizations in Seymour. Chief Lucas comes to us through the Indiana Fire Chiefs Association – one of our partners in the legislative process.

UNDERSTANDING THE TA-7 – SUITES 4/5

Much of the TA-7 is straight-forward in the reporting requirements. Software is only as good as the information which is input, so how to input the data that will produce an accurate report will be addressed in this session. Additionally, there is still a considerable amount of data required which is not so straightforward. What the IC and the SBoA advise as to how to report subjective data will also be addressed during this session. We will address how townships can produce an honest report that truly reflects the value of the assistance given, and the time committed to that assistance. The annual Trustee's Township

Assistance Statistical Report can be complicated and confusing. Hear how a couple of townships have interpreted the instructions. They will share how filing an accurate report can help the public understand better what your office is doing to provide necessary services to your residents in need.

Presented by –

Frank Gribble (Chief Deputy of Center Township, Howard County – Kokomo) and Trustee Robert Lee have worked together for almost 40 years. When Dr. Lee was elected as Trustee, it was a natural progression for him to appoint Frank as his Chief Deputy. Among other duties, Frank maintains the IT systems, the website, and has helped lead in the transition of the township software to Tom's Web, but his IT skills allow him to keep constant updates to the township statistics which are reported in the TA-7. Frank's knowledge of Indiana Code, State Manuals and regulations has allowed him to answer questions and to assist other local townships with their annual reports.

Chris Holtzleiter – (Hartford City) has been the Licking Township Trustee in Blackford County since 2007. She serves on the Community and Family Services Advisory Council and FEMA Board. Chris was the first woman in Blackford County elected to the 4-H Fair board where she served for 8 years. When not working, you will find her at a local ball field cheering on her grandchildren.

WHOSE BUSINESS IS THIS? IN PUBLIC ACCESS – SUITES 6/7

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PROVIDING EMPLOYEE BENEFITS – SUITES 8/9/10

Have you wanted to provide benefits to the trustee and other township employees? This panel will include experts to present options and the "how to" for those options. We'll compare the advantages of the governmental 457(b) plan to other personal savings vehicles, highlight benefits within the State of Indiana's Hoosier S.T.A.R.T. 457(b) / 401(a) plan. Great option for Board Members and Trustees.

Presented by –

Todd Williams – is a Retirement Plan Advisor with Empower Retirement, the record keeper and educator to participants and eligible employees in the State of Indiana's Hoosier S.T.A.R.T. Deferred Compensation Plan. His responsibilities include marketing and outreach to Indiana's local government employers who are eligible to participate in the Plan, but may not fully understand its benefits. He has 11 years of experience in the retirement industry.

Jeff Bellamy – Partner, Thrasher Buschmann and Voelkel, P.C. - Jeff is a practicing real estate, land use, and government services attorney and litigator. He has been involved in real estate and local government for nearly 20 years. Jeff's career began working at the City of Indianapolis Department of Metropolitan Development on land use and zoning matters. After clerking for the Indiana Tax Court, Jeff began private practice as an associate with the Indianapolis law firm of Thrasher Buschmann and Voelkel, P.C. and is currently a Shareholder in the firm. He has assisted Township Trustees on platting, vacation, boundary disputes, permitting disputes, cemetery matters, appropriations and real estate transactions, both in Court and before local administrative boards. In 2013 and again in 2014, Jeff was recognized as an Indiana "Super Lawyer – Rising Star" by his peers in the profession.

Lisa Anderson - has been with the Indiana Public Retirement System (INPRS) for over 7 years. With more than 20 years of experience in the retirement services industry, Lisa has worked extensively with plan members, helping them to invest, save, and plan for their financial futures. Lisa has also worked closely with employers, consulting on retirement plan design, compliance and conversions. A Colorado native, Lisa holds a Bachelors degree in Business from the University of Colorado and a Master's degree in Management from Regis University of Denver.

Richard Sutton - As an independent broker/consultant, Richard works with a variety of small and large employers and specializes in working with school systems, libraries and other public employers. Prior to founding RE Sutton & Associates, LLC in July, 2001, Richard was a partner at the firm of D.B. Englehart & Associates. Before his consultant work, Richard worked ten years at Blue Cross/Blue Shield and The Acordia Companies. Richard is on the advisory board for several insurance and health related corporations and was one of the driving forces behind the creation of the IPEP medical program. Richard was included in the 2011 Indianapolis Business Journal list "Who's Who in Health Care and Benefits."

INVESTIGATORS' ROUNDTABLES – SUITES 13/14

No matter what size of township you work for, there will be place for you to discuss your challenges, experience and questions with fellow investigators. [Heavy= >100 cases per year; Moderate = 50-100 cases per year; Small = <50 cases per year]

Facilitated by –

Sherry Holder & Christina Lewis (Heavy caseloads) – Wayne Township, Marion County (Indianapolis)

Elly Baggett – (Moderate caseloads) – St. Joseph Township, Allen County (Ft. Wayne)

Michelle Junkins – (Small caseloads) Adams Township, Hamilton County (Sheridan)

OFF-SITE LEARNING OPPORTUNITY – Join us for a behind the scene tour of **Wheeler Mission** on Monday afternoon. They will share with us the struggles and hope they are seeing and how we can bring hope to our communities. **You must pre-register for this OPTIONAL activity. Check with the registration table regarding availability.**

Tuesday, September 26 Classes

SESSION I – 8:30 – 9:45 AM

KEEPING IT LEGAL WHILE DENYING TOWNSHIP ASSISTANCE – PLAZA “A”

Learn on what LEGAL basis a trustee can deny assistance. Make a denial that should withstand appeal. Learn what can get you in real trouble that you will want to avoid.

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INVESTING, FINANCING & PURCHASING EFFICIENTLY – PLAZA “B”

Make the most of your funds as you move toward purchasing. This panel of experts will include representatives of state agencies and programs along with a township financial consultant who will tie it all together for you. Great class for Board Members & Trustees.

Cindy Barger – TrustIndiana to present on investing of public funds - Cindy serves as the Director of TrustIndiana, Indiana's state sponsored local government investment pool. She travels the State of Indiana meeting with local government officials to offer a safe investment option for public funds. Prior to moving to the Treasurer's office in September of 2014, she served as a staff accountant for the Indiana Finance Authority. For over six years, she worked as the Office Manager/Lease Purchase Coordinator at the Indiana Bond Bank. She earned an A.A.S. in Business Administration from Ivy Tech Community College and a B.S. in Accounting from Indiana Wesleyan University. Cindy and her husband Randy reside in Brownsburg, Indiana

Ron Mangus – Indiana Bond Bank will present on borrowing

Stan Judson – Indiana Dept. of Administration will cover purchasing efficiently

Jeff Peters - will present requirements to be met in order to make capital purchases and will be the overall resource panelist – Jeff has provided fiscal services to local units of government, utilities, and related entities for 22 years. He has also founded/co-founded two municipal finance consulting firms. Jeffrey's accomplishments and experience include: Indiana University -Bachelor of Science in Public Affairs, Indiana University - Master of Public Affairs, IUPUI - Graduate Non-Degree Accounting Program, Indiana - Certified Public Accountant (Inactive), MSRB Series 50 Qualified Representative, Indiana State Board of Tax Commissioners (DLGF) -Assistant to Budget Director/ Hearing Officer, Indiana Local Government Budget Consultant, Fiscal Planner, Debt/ Bond Financial Advisor, Utility Rate Consultant, TIF Consultant, Abatement Consultant, and Annexation Consultant.

Chris Miller – Jackson Twp. Trustee, Hamilton County - Classroom Facilitator & Moderator

UNDERSTANDING THE TA-7 – PLAZA “C”

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SERVESAFE PANTRY TRAINING – SUITES 4/5

You MUST pre-register for the class – please check at registration table regarding availability.

The ServSafe Food Handler Guide for Food Banking and Food Pantries is designed to teach basic food safety practices for emergency food pantries. This course focuses on transporting, receiving and storing food properly to keep it safe for clients of a food pantry. (This course is not the full ServSafe Manager Course needed for on-site feeding programs and soup kitchens.) There is an enhanced assessment at the completion of the course and a certificate awarded for completion with at least 76% correct. This class will be taught over TWO sessions (8:30 – 11:15 AM).

Presented by - Dawn Wolf is the Director of Agency Relations at Gleaners Food Bank of Indiana. She oversees the Agency Relations team in areas of compliance and capacity building which includes the Agency Services Office to provide great customer service. She is also responsible for the onsite food pantry, the Cynthia H. Hubert Community Cupboard which serves over 4000 households each month. Dawn has a Bachelor of Science in Organizational Leadership and an extensive customer service background, focusing on process improvement and training. Dawn can be reached at 317-925-0191 or 800-944-9166 ext. 128 or dwolf@gleaners.org.

IN HOUSING AUTHORITY PROGRAMS & MORE – SUITES 6/7

This class will be an overview of the services and programs of the Indiana Housing & Community Development Authority (IHCDA). The IHCDA not only oversees the Section 8 Housing vouchers and Energy Assistance, but many other programs – many of which caseworkers need to be aware.

Presented by – Brian Philps, Outreach and Communications Project Manager, IHCDA

PAYROLL TIPS FOR PAINLESS PROCESSING – SUITES 8/9/10

This session will include a panel discussion, following brief presentations by each panelist. The panel will include a Township payroll specialist, as well as a representative from an international payroll service. Participants will receive a comprehensive overview of their responsibilities in complying with Federal and State payroll processing and reporting rules and regulations, including grass roots experiences from a Township Official's perspective. The workshop will also include alternatives to the traditional means of producing payroll and all of the related reporting requirements.

Presented by –

Otto W. “Buzz” Krohn, the founder and Executive Partner of O. W. Krohn & Associates, LLP, has nearly 40 years of experience as a financial advisor and consultant to local government and utilities. He is a graduate of Indiana University's Kelley School of Business. After spending eight and a half years with a regional CPA & Consulting firm, Krohn established his own practice in 1986. He received accreditation from the Institute of Management Consultant as a Certified Management Consultant (CMC) and as well as the American Institute of CPAs international credential as a Chartered Global Management Accountant (CGMA). Krohn is a Registered Municipal Advisor with the Securities and Exchange Commission and has worked with ITA and many of its members for nearly 30 years.

Heather Willman - is a lifelong central Indiana resident. While attending Taylor University, she received her degree in Business Administration, minoring in Math. She has worked at the Delaware Township Trustee's office in Hamilton County in various capacities since high school and has held the Clerk position for 10 years. Heather loves all sports but especially enjoys cheering on the Colts, Pacers, and Cubs. Heather has volunteered with the high school youth ministry at her church for 14 years and spends much of her free time spoiling her four nieces and nephews.

Sarah Feeley - is a Senior District Manager for ADP in Indianapolis. She is going on her fourth year with the company and throughout her time at ADP has helped several businesses better manage their people and cash flow, while mitigating risk through tax and labor law compliance. Sarah works closely with many of the accounting firms in the greater Indianapolis area to provide support to their business clients with regard to payroll, human resources, and benefits. Sarah achieved the FPC “Fundamentals of Payroll Certification” in 2016 and continues to expand her knowledge on the subject matter every day.

Lori Lockhart - is a Sales Executive for ADP in Indianapolis. She has been with the company for six years and manages a team of ten District Managers. Before her time managing, she was a Senior District Manager who worked closely with accounting firms in the greater Indianapolis area. Lori manages a book of 2,800 business clients in central Indiana to help streamline their back office practices. Lori achieved the FPC “Fundamentals of Payroll Certification” in 2015 and continues to expand her knowledge on the subject matter every day.

SESSION II – 10:00 – 11:15 AM

KEEPING IT LEGAL WHILE DENYING TOWNSHIP ASSISTANCE – PLAZA “A”

Learn on what LEGAL basis a trustee can deny assistance. Make a denial that should withstand appeal. Learn what can get you in real trouble that you will want to avoid.

Presented by - Debbie Driskell is serving her 27th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 12th year as the ITA Executive Director. She has worked to live out her passion to see others be the best they can be in a job that is vital to the fabric of our communities.

IS IT TIME TO FORM A FIRE PROTECTION TERRITORY? – PLAZA “B”

This class will center on the real-life experience of Bloomington Township's initiation of a local fire territory. The trustee will share her experiences – the good, the bad, and the ugly – of making the decision to move forward through the steps of getting it done to one year later. This presentation would be best described as “lessons learned on the job”. Following the trustee, the

attorney and the financial consultant for her township will share their viewpoints and expertise and the “how-to’s” of forming a territory.

Presented by -

Lillian Henegar started her tenure as the Bloomington Township (Monroe County) Trustee on April 1, 2013. Henegar grew up in Monroe County. She has lived in diverse communities across the country and has a master’s degree in public administration. For more than 30 years, she has held professional and volunteer leadership positions in government and nonprofits – at both the state and local levels. Bloomington Township is a 36 mile square in the middle of Monroe County with more than 44,000 people of diverse social and economic backgrounds. The Township’s 2017 budget is approximately \$3.6 million. The Township is the provider unit for the Northern Monroe County Fire Protection Territory, which was created this year with Washington Township.

Paige Sansone is a graduate of Indiana University with a Bachelor of Science degree in Finance and a Masters of Professional Accountancy. In 2008, Paige successfully completed the requirements to become licensed as a Certified Public Accountant in the State of Indiana. Paige joined Umbaugh in September 2003 as the Budget Services Coordinator. Since 2003, Paige has been involved with several professional engagements including financial studies for municipalities that often involved the determination of the impact of levies, tax rates and assessed values based on various scenarios arising from local or legislative initiatives. In addition, Paige has assisted numerous taxing units with budget preparation and capital planning. Prior to joining the firm, Paige was employed as the Assistant Budget Director for the Department of Local Government Finance (DLGF). Over the five years Paige spent with the DLGF, her primary focus was on local government budgeting.

Stephen R. Buschmann is an attorney with Thrasher Buschmann and Voelkel in Indianapolis and has been the attorney for the ITA for the past thirty years. Steve is considered state-wide to be proficient in township laws and acts as the township attorney for many townships across the state.

HOMELESSNESS & TRANSITIONAL HOUSING – PLAZA “C”

This session will clarify the trustee’s constitutional responsibility to provide for the homeless and give three examples of how three townships are accomplishing that in different areas of the state. They will share sample policy statements, rules and release of liability forms.

Presented by:

Craig Beckley - Craig Beckley started teaching 5th grade in 1973 and earned a Master’s Degree from Xavier University, Cincinnati, Ohio. After two years as the Principal of a small Christian school, he began working in the social service field providing services to the elderly. While working as the evening coordinator for the Lawrenceburg branch of Ivy Tech he also volunteered time twice a week in a men’s homeless shelter in Covington, Ky. He has served one term as a county commissioner and is in his 19th year as a Trustee. Craig was hired as the first employee of Heart House Inc., a local group seeking to address the problem of homelessness in southeast Indiana. A 72-bed homeless shelter opened in March 2002, meeting the needs of the homeless in five southeastern Indiana counties.

Tom Kenley – Tom is a native of Noblesville and graduated from NHS as a Miller. He began working at the family grocery store at the age of 12. He and his brother, Luke, worked together managing the business from 1974 to 1998. Tom worked the next 15 years as a local realtor. He was elected to the township board in 2010 and as Trustee in 2014. Tom has two children, Holly and Heather, and two grandchildren, Liam and Kinsey.

Ben Jackson - Ben Jackson has been the Columbus Township Trustee since July of 2013, having assumed the position when the previous Trustee retired. Of the twelve Townships trustees in Bartholomew County, Columbus Township is the only one with a full-time Trustee and an office/staff. Among his other duties as Trustee, Ben has worked with numerous community partners to transition Bartholomew County's homeless services into a Housing First model, including opening a low-barrier, housing focused shelter in 2016, and expanding the communities Rapid Re-housing program.

SOCIAL SECURITY ADMINISTRATION PROGRAMS – SUITES 6/7

This overview will include useful information about the programs provided that go beyond the retirement fund and into the realm of referrals for our clients. This will be a great class for caseworkers.

Presented by –

Michael Kirkham is a Technical Expert in the Indianapolis downtown Social Security office. He has been employed with the Social Security Administration since 1991. Michael works directly with the public on a daily basis explaining Supplement Security Income and developing, adjudicating, and authorizing the most complex and non-routine cases. He is also an expert in the Interim Assistance Reimbursement (IAR) process.

Cindy Bantista is a Technical Expert in the Indianapolis downtown Social Security office. She has been employed with the Social Security Administration since 1997. Cindy works directly with the public on a daily basis explaining SSA’s programs and processing the most complex retirement, survivors, disability, and Medicare claims.

INSURANCE – REQUIRED VERSUS RECOMMENDED – SUITES 8/9/10

Insurance can be perplexing and frustrating for most people, and misunderstandings and a lack of knowledge can lead to catastrophic financial distress for townships. Paul will lead an interactive presentation focusing on the insurance requirements and recommended coverage for Indiana townships and volunteer fire departments. He will discuss the latest “bonding” requirements/options and the requirements noted under the Volunteer Fire Department section of the Indiana Code. Paul also will discuss cyber crime, internal theft, and “employment-related” claims, all of which have potential significant impact on townships. He will include a discussion on best practices of insuring township and fire department buildings, contents, portable equipment, and vehicles.

Presented by – Paul Zilz has been providing quality risk management products and services for townships and emergency response organizations for over 25 years. He insures a significant number of townships; volunteer and combination fire departments; EMS departments; fire territories and districts; county firefighter associations; and state associations. Paul was graduated from Indiana University-Bloomington with a Master of Business Administration degree and served for a time as a financial analyst with Exxon USA. Having graduated top in his class at the national Commercial Lines School for Agents sponsored by Commercial Union, Paul furthered his insurance education by obtaining the Chartered Property Casualty Underwriter (CPCU) designation in 1995. He has presented risk management seminars in a variety of national forums. Paul and his wife Peggy have been married for over 30 years and are blessed with four adult children and one son-in-law.

SESSION III – 12:45 – 2:00 PM

THE DRUG EPIDEMIC – PLAZA “A”

We all know that drug abuse is a widespread problem that is affecting us all. What can you do to combat the epidemic and see that those suffering from addiction get the necessary help to survive? This presentation will cover activities led by the State to address the opiate crisis in Indiana. Federal grants, state initiatives, enhancements in Medicaid, expansion of treatment options are being coordinated to provide a comprehensive approach to substance use disorders.

Presented by - Kevin Moore is the Director of the Indiana Family and Social Services Administration, Division of Mental Health and Addiction. He was appointed Director on January 1, 2012, and is responsible for the public mental health and addiction treatment system including the 6 state psychiatric hospitals. He was appointed after serving as Assistant Director for DMHA for 2 years directly supervising the operations at each of the state psychiatric hospitals as they integrated the values and goals of the recovery model. Kevin worked 24 years with the Department of Correction in a variety of direct service and administrative positions.

EFFECTIVE BOARD GOVERNANCE – PLAZA “B”

In this session, participants will learn about the fundamental roles and responsibilities of township board members and how to exercise that role effectively. Participants will discuss the relationship between the board and trustees and develop a clear understanding of their respective responsibilities for township governance and management. Both board members and trustees are invited to participate in this conversation to learn how to improve their partnership. Effective meeting management and accountability—skills that serve members in their board service and in other areas—will be discussed to help participants learn strategies for ensuring an efficient and productive board.

Presented by - Rachel Mattingly is the Program Manager for Comprehensive Community Development at Prosperity Indiana. She delivers training and technical assistance to organizations and units of government across the state to increase their capacity to create vital communities. She has previous experience as an Organizational Development Consultant and a program manager overseeing energy efficiency upgrades in a low-income neighborhood in Indianapolis. Rachel has served on the board of a community center using the Center for Working Families model and is currently board president of a neighborhood-based charter school in Indianapolis.

WHOSE CEMETERY IS THIS? – PLAZA “C”

“Township Trustees are responsible for all abandoned cemeteries!” Well, at least that is what the public views as the responsibility of the Trustee. Come and learn the legislative mandates, where to find help, and what you can do to help the cemeteries you really are supposed to care for (it’s not ALL of them!). The class will include a lawyer who will explain how to take title/deed and answer other legal questions.

Presented by –

Jeannie R. Regan-Dinius is the Director of Special Initiatives for the Department of Natural Resources’ Division of Historic Preservation and Archaeology. She will discuss the state of cemeteries in Indiana, what is being done at various levels to protect and restore them, and what we can do to help. Jeannie has a life-long interest in history, family history, and research. She earned her Bachelors in Public History from Ball State University, where she studied also anthropology and American Studies. She has her Masters in Urban Planning and Information Management/Library Science from Indiana University-Purdue University at Indianapolis with additional graduate course work in public history.

Jeff Bellamy – Partner, Thrasher Buschmann and Voelkel, P.C. - Jeff is a practicing real estate, land use, and government services attorney and litigator. He has been involved in real estate and local government for nearly 20 years. Jeff’s career began working at the City of Indianapolis Department of Metropolitan Development on land use and zoning matters. After clerking for the Indiana Tax Court, Jeff began private practice as an associate with the Indianapolis law firm of Thrasher Buschmann and Voelkel, P.C. and is currently a Shareholder in the firm. He has assisted Township Trustees on platting, vacation, boundary disputes, permitting disputes, cemetery matters, appropriations and real estate transactions, both in Court and before local administrative boards. In 2013 and again in 2014, Jeff was recognized as an Indiana “Super Lawyer – Rising Star” by his peers in the profession.

FOOD IS NOT TRASH! FOOD RESCUE – SUITES 4/5

22 million unopened and unpeeled food items annually go uneaten from the trays of our students in Indiana from both breakfast and lunch. 1 billion items nationwide go uneaten, and if these items end up in a landfill, they have a negative impact on our environment, teach kids that nutritious food has no value, and foster a thankless rather than thankful attitude in our students. This session will be devoted to how to start a community grassroots movement to educate your local administrators,

food service directors, cafeteria managers, and decision makers on the myths that continue to be propagated that keeping unopened food from the trays of students out of a landfill and into the hands of a community food pantry is not only safe and legal, but also encouraged by the USDA, EPA, ISDH, and IDOE.

Presented by – John Williamson is the current Executive Director and founder of Food Rescue and K-12 Food Rescue in Noblesville, IN. He has been with Food Rescue for the past 10 years and holds a Bachelors Degree in Physical Education from Ball State University. In 2008, he was named Hamilton County's Citizen of the year by the Indianapolis Star, Noblesville Ledger, and St. Vincent's Hospital, and has been named an Indiana Hero by the Indiana Pacers organization, and a Jefferson Award Winner for public service in 2012 from Citizens Gas and WRTV. In 2016, the global organization Food Tank named Food Rescue as one of 59 organizations fighting the global food waste crisis, and NUVO magazine awarded Food Rescue it's "Trail Blazer" award in the area of sustainable food innovations.

PURSUING OCRA GRANTS – SUITES 6/7

Understanding what state and federal grants are available through the Indiana Office of Community and Rural Affairs (OCRA) and how Townships can access those funds. From waste water to fire stations find out how OCRA and your township can work together.

Presented by –

Colette Childress serves as a Project Manager with the Indiana Office of Community and Rural Affairs, known as OCRA. Colette and the Project Team is overseen by OCRA's Deputy Director, Matt Crouch, and Executive Director Jodi Golden and is part of Lt. Governor Suzanne Crouch's Family of Business. Lt Governor Crouch oversees OCRA as well as the Indiana Housing and Community Development, Department of Agriculture, Indiana Office of Tourism Development, and the Office of Defense Development.

Tammy Butts is the Director of Grant Services with the Lieutenant Governor's Business Office. Grant Services focuses on assisting communities to implement successful grant projects funded by the Office of Community and Rural Affairs and the Office of Tourism Development. Grant Services also provides technical assistance as needed to the Department of Agriculture and Defense Development. Tammy has been involved with CDBG and other OCRA programs since 2005. Tammy holds a Masters of Social Work from Indiana University and a bachelor's degree from Anderson University. Prior to joining OCRA, she had a successful career in social work where she worked with at-risk youth and adults, assisting them in overcoming the barriers they faced in obtaining education, training, meaningful employment and overcoming emotional challenges. Growing up in a small agricultural community in Northeast Ohio, Tammy is aware of the many challenges rural communities face as they strive to provide services to their residents. She has worked in rural and urban settings.

UTILIZING THE INTERNET for TOWNSHIP CLIENTS & INVESTIGATIONS - SUITES 8/9/10

A hands-on presentation for learning the basics to establish an online workstation for your clients to use in your office as well as helpful tips and websites to use during your caseworker investigations. This course will be two parts; 1. Connecting to the internet, basic terminology, setting up Bookmarks to help clients where to go online to apply for benefits and 2. Using helpful websites for your caseworker investigations and office. Bring your smart phone, tablet or laptop to follow along and learn how to quickly utilize the tools of the Internet. A few laptops will be available to use, first come first served.

Presented by –

Joe Chitwood is a lifelong resident of Grant County, Joe was in the Army and the Indiana Army National Guard for 27 years. His last assignment was Active Duty National Guard for 5 years at the Michigan City Indiana Armory. After retiring in 2007 he went to work as a DVOP (Vet Rep) in the Portage WorkOne. He floated back and forth between the Portage and the LaPorte WorkOne for 5 years working his way from Vet Rep to Office Manager. Joe decided it was time to return to Grant County to be close to family so he applied for and got the County Coordinator position at the Fishers WorkOne in July of 2012 and has been working there until they moved into their new office inside the Ivy Tech Campus in Noblesville where he is today.

Heather Souder is a graduate of Hamilton Heights and attended Indiana State University majoring in Communications. Heather has over 21 years of experience in the Telecommunications and Marketing Industries and over 15 years of experience in Customer Service. She has designed and maintained the Township's website and social media accounts and is currently serving as the Deputy Trustee of Jackson Township – Hamilton County.

SESSION IV – 2:15 – 3:30 PM

PUBLIC SECTOR EMPLOYMENT – AVOIDING SERIOUS PROBLEMS – PLAZA “A”

This session will provide a high-level overview of the federal and state employment laws that affect local governmental units, including obligations under Title VII of the Civil Rights Act, the Family and Medical Leave Act, and the Americans with Disabilities Act. Additionally, the instructor will discuss unique legal issues facing the government as an employer (such as the First Amendment to the U.S. Constitution and state law ethical matters).

Presented by Matthew Brown. After earning his bachelor's degree in public affairs with a concentration in public management from Indiana University, and during law school, Matt worked for the Indiana State Personnel Department—first as an employee relations specialist, then as Director of Dispute Resolution. He also served as a judicial intern for the Honorable Larry J. McKinney in the U.S. District Court for the Southern District of Indiana. Matt graduated from the Robert H. McKinney School of Law in 2013, summa cum laude, and began working as an associate attorney in with Faegre Baker Daniels LLP's Labor & Employment practice group. As an associate, Matt represented clients in federal and state courts, as well as before the EEOC, NLRB, and other agencies regarding a broad spectrum of issues affecting the employment relationship. In 2014, Matt returned to the Indiana State Personnel Department as Employee Relations Counsel and, later, as Interim Director of Talent Acquisition. In this role, Matt and his team oversee the State's defense to administrative charges filed with various federal and state agencies, internal employee appeals, and workplace harassment investigations. He also counsels state agencies on day-to-day human resources matters, State policies, the State's employee handbook, and federal and state employment laws.

FUNDING FIRE PROTECTION – PLAZA “B”

Funding fire protection has two distinct components: capital and operations. This session will investigate both. Capital funding is more straightforward with established methods and caps, while operations are much more complicated to fund with multiple scenarios scrutinized outside the control of Townships. Capital funding discussion will include pay-as-you go, bank loans, general obligation bonds, and lease-rental purchase bonds. Operations funding discussion will include pay-as-you go, fire and emergency services loans, Fire Districts, and Fire Territories. Operations funding under pay-as-you go will include discussion regarding revenue allocation and use of Rainy Day Funds. Operations funding under fire and emergency services loans will include discussion on the temporary nature and use as bridge or gap financing. Operations funding under fire districts and territories will discuss political concerns, control, flow of funds, and related financial aspects.

Presented by - Jeffrey Peters has provided fiscal services to local units of government, utilities, and related entities for 22 years. He has also founded/co-founded two municipal finance consulting firms. Jeffrey's accomplishments and experience include: Indiana University -Bachelor of Science in Public Affairs, Indiana University - Master of Public Affairs, IUPUI - Graduate Non-Degree Accounting Program, Indiana - Certified Public Accountant (Inactive), MSRB Series 50 Qualified Representative, Indiana State Board of Tax Commissioners (DLGF) -Assistant to Budget Director/ Hearing Officer, Indiana Local Government Budget Consultant, Fiscal Planner, Debt/ Bond Financial Advisor, Utility Rate Consultant, TIF Consultant, Abatement Consultant, and Annexation Consultant.

CEMETERY RESTORATION WITH JOHN “WALT” WALTERS – PLAZA “C”

This class is always packed with attendees who hear Walt explain the do's and don'ts of care for cemetery gravestones. Walt is considered the cemetery “guru” in the field of restoration and care of these historical markers. Walt will share his expertise in the “hows and whys” of cemetery preservation. Walt is considered an authority on the subject. You are certain to leave this class more knowledgeable than when you entered.

Presented by - John “Walt” Walters was from 1996-2000 the Fayette County Pioneer Cemetery Supervisor. From 2001 to present has been Owner/Operator of Graveyard Groomer. On a regular basis, he instructs classes for the Indiana Historical Society on Cemetery Restoration, genealogy groups and other Historical Societies in several counties and states. He took his first tombstone repair class in 1997 and in 2000, attended Association of Gravestone Studies Conference in Washington DC. Walt received Indiana Historic Preservation Award in 2006. He attended Southeast Cemetery Monument Conservation Workshop in Pensacola, FL., sponsored by National Center for Preservation Technology and Training and in 2010 attended Jahn Restoration Mortars Training in Hanover, MD. Walt spends five days a week in cemeteries. At times it may be seven. He has seen what did not work in the past, and has learned from that. He continues to educate himself in all aspects of cemetery restoration and preservation.

TOWNSHIP BURIALS – SUITES 4/5

What the Indiana Code says about burial assistance? In this class you will learn about working with your county coroner, eligibility standards, how to work with the funeral home, and how to file a lien on property in order to recoup assistance. You will hear the importance of doing an investigation on all applications for burial assistance.

Presented by Mark Messick who has served as the White River Township Trustee in Johnson County since taking office in 2010. Prior to serving as trustee, Mark served on the township board from 2000-2010.

PREPARING FOR AN AUDIT –THE SBOA CHECKLIST – SUITES 6/7

This session will provide information on the various types of engagements that the State Board of Accounts could perform for a township. You will learn the basic procedures that will be performed by SBOA Field Examiners and the format of the public report that will be issued at the conclusion of the engagement. We will provide information on HEA 1031 – State Examiner Findings – and the plans to implement its requirements. Finally, you will be provided tips and suggestions on how to plan for an SBOA engagement.

Presented by –

Ryan Preston graduated from Hanover College in 2001 with a Business Management Degree and immediately started working for the Indiana State Board of Accounts. He first worked as a field examiner for 10 years before being named Director for Schools and Townships in 2011. He comes from a family of public servants – his mother is the Randolph County Recorder and his father served as a Winchester City Councilman. His wife is a High School English teacher. Ryan currently keeps busy by watching and coaching my three children in life and sports.

Chase Lenon was born and raised in Kokomo, Indiana, where he attended Northwestern High School. He graduated from Ball State with his Masters in Accounting. His first job out of college was with the State Board of Accounts which he very much enjoys. He began in the State Assignments division before moving to the Schools/Townships area.

UTILIZING THE INTERNET for TOWNSHIP CLIENTS & INVESTIGATIONS - SUITES 8/9/10

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TOWNSHIP BOARD MEMBER ROUNDTABLE – SUITES 13/14

Facilitated by: Jeff Roberts has served 9 years as Board Member of Jackson Township, Hamilton County.

SESSION V – 3:45 – 5:00 PM

PROTECTING YOUR TOWNSHIP AGAINST IDENTITY THEFT – PLAZA “A”

The State Attorney General's office will present information on keeping safe from identity theft and what to do if you suspect this damaging crime. Identity Theft has been the leading consumer complaint for the past 15 years, reaching a record high 15.4 Million incidents in 2016, representing losses of \$16Billion, a \$1Billion increase over 2015. The course will:

- Define and provide examples of the most common forms of Identity Theft,
- Define Personally Identifiable Information,
- Discuss the steps to take to protect physical security,
- Discuss the steps to protect digital security,
- Discuss officials' potential liability and duties should a breach occur, and
- Identify Indiana Statutes Township officials should know.

Presented by - Douglas Swetnam is Section Chief of the Data Privacy & Identity Theft Unit in the Office of Indiana Attorney General Curtis Hill. He has served as a small business adviser to Indianapolis Mayor Stephen Goldsmith, and provided research and analysis to the city's Regulatory Study Commission. He was an analyst and author for the Indiana Policy Review Foundation during the time Vice-President Mike Pence served as Foundation President. He has worked for several Fortune 500 companies in Web Technologies, Corporate Marketing, and Communications. He has been a frequent presenter for Washington, D.C.-based Political Affairs Group on communications, technology and e-Business.

MEET YOUR STATE FIRE MARSHAL – PLAZA “B”

Improve your understanding of the structure of the Indiana Department of Homeland Security (IDHS) and the offices you may contact for assistance and support. You will learn your responsibilities with regard to volunteer fire departments and local festivals and events.

Presented by – Jim Greeson is a lifetime resident of Indianapolis, he received an Associate's Degree from Indiana Vocational Technical College, attended Indiana University Purdue University and the National Fire Academy. Jim is a veteran of the U. S. Army. He joined the Indianapolis Fire Department (IFD) in January of 1970. He was appointed Chief of IFD in June of 2004, and held that position until his retirement in April 2008 completing thirty-eight years of service to the citizens of Indianapolis.

Governor Mitchell Daniels appointed Chief Greeson as Indiana State Fire Marshal on May 12, 2008. Governors Michael Pence and Eric Holcomb made reappointment on 2013 and 2017 respectively.

CEMETERY RESTORATION WITH JOHN "WALT" WALTERS – PLAZA "C"

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WEEDS & FENCES – SUITES 4/5

This class will introduce you to the state laws pertaining to weeds & fences and will be presented by an experienced trustee and attorney. Each attendee will receive a copy of the codes as well as discuss the basics of the Township's involvement in weeds and fences. Understanding the Townships' role in each of the topics.

Presented by –

Steven L. Anderson has been the Franklin Township, Washington County Trustee for 39 years and has been involved in many weed and fence complaints. Steve also has served on the Washington County Weed Board for 39 years. Steve has a Private Applicators License issued by Purdue. Steve is also the President of the Washington County Trustees Association.

Jeff Bellamy – Partner, Thrasher Buschmann and Voelkel, P.C. - Jeff is a practicing real estate, land use, and government services attorney and litigator. He has been involved in real estate and local government for nearly 20 years. Jeff's career began working at the City of Indianapolis Department of Metropolitan Development on land use and zoning matters. After clerking for the Indiana Tax Court, Jeff began private practice as an associate with the Indianapolis law firm of Thrasher Buschmann and Voelkel, P.C. and is currently a Shareholder in the firm. He has assisted Township Trustees on platting, vacation, boundary disputes, permitting disputes, cemetery matters, appropriations and real estate transactions, both in Court and before local administrative boards. In 2013 and again in 2014, Jeff was recognized as an Indiana "Super Lawyer – Rising Star" by his peers in the profession.

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THE NEW, ON-LINE "SMART" TA-1; NET RESULTS PRESENTATION – SUITES 8/9/10

Net Results introduces its new, on-line "smart" TA1 form. This form will guide the applicant through the application process, ensuring the process is more efficient, accurate and understandable. Much of the caseworker's screening of the application will be already completed, saving them valuable time and reducing errors. Once complete the data will automatically import into TOMSweb, and a fully SBOA compliant TA1 form may be printed. Come see the latest innovation in technology designed to help your township best serve the needs of your community!

**Our ITA Associate Members are invited to purchase classroom time for their business presentation. Their support helps offset conference expenses for the attendees.*

Presented by – Bill Costa has worked for Net Results and with Indiana townships for over 21 years. He values the customer relationships he has formed during this time. Bill enjoys a good challenge and likes to "dig in" to any troubleshooting or technical issue. He is a US Air Force Veteran that loves traveling, sports and spending quality time with friends and family.

OFF-SITE LEARNING OPPORTUNITY - Take a tour Tuesday morning of Wayne Township, Marion County Fire & Emergency Services Training Grounds with Fire Chief Gene Konzen. Learn from Chief Konzen how he took the volunteer fire department to a career department. He will share with you more experiences he faced with fire territories and providing fire & EMS services. You must pre-register for this OPTIONAL activity – limited availability. Inquire at registration table.

Wednesday, September 27 Classes

These three classes are approximately 3 hours in length and Certificates of Completion will be provided for attendees. While the subjects may sound familiar, we have "re-tooled" the classes to make them relevant to even long-time attendees of the conference.

ITA CASEWORKER CERTIFICATION I – PLAZA "A" This class is an advanced class and will be presented in two distinct parts:

PART I Case Management 101 - Standards of Practice for Best Outcomes – This presentation will include the case manager's necessary skills—interviewing, critical thinking, teaching, advocacy, negotiation, and documentation. The presentation will be provided by an experienced and licensed case manager and an Elder Law Attorney; and We consider this to be an Advanced Class.

Presented by –

Kate Kunk, R.N., CIRS-A/D, Caregiver Options Counselor for CICOA Aging & In-Home Solutions, coaches Hoosiers on a variety of topics related to optimizing quality of life. Kate has been a Case Manager for CICOA, for homeless shelters in New York City and Virginia's Roanoke Valley, and for a psychiatric clinic in Tennessee's Great Smoky Mountains. She also worked in the publishing industry for over three decades, during which time she wrote and developed educational materials for McGraw-Hill and Pearson in the New York Metropolitan area. Kate holds degrees in nursing and sociology, and certificates in gerontology and faith community nursing.

Carol Applegate, Elder Law Attorney

PART II Making Successful Referrals and Coordinating Services by understanding State, Federal and Non-profit services in your community. This will be a panel presentation to include representatives of various departments within the FSSA (Family and Social Services Agency) and moderated by an experienced trustee who is seen as a leader in her community. She will share her story and how networking in her community has provided successful referrals and better resources for her clients.

Panelists -

Matthew Schomburg - Refugee Services

Suzanne Tryan – SNAP/TANF/IMPACT

Natalie Angel - Medicaid

Moderator – Julie Roush serves as Fairfield Township Trustee in Tippecanoe County and is the West Central Area Director for ITA. She has been involved with townships for over 15 years. She was honored as Woman of the Year by her County's Women's Club in 2016, awarded Trustee of the Year in 2013 and Township of the Year in 2011. She stays active in the community by serving on the Cary Home Advisory Board, Tree Lafayette, Purdue's Community Relations Advisory Committee, Tippecanoe County's Child Protective Team, and was recently a Greater Lafayette Honor Flight Guardian. Julie earned her MBA from Purdue University, along with degrees in Psychology & Economics, and holds Licenses in Financial planning, Life and Health Insurance, and is a Microsoft Office Certified Specialist.

ITA FINANCE CERTIFICATION – PLAZA "B"

This presentation will be given by an experienced CPA and financial consultant from Umbaugh, Paige Sansone. She will guide you to understanding the F43 certification of your budget (1782 notice), Rainy Day Fund (start to finish), Transfers of Funds, Incurring Debt, and much more. We consider this to be an Intermediate Class.

Presented by - Paige Sansone is a graduate of Indiana University with a Bachelor of Science degree in Finance and a Masters of Professional Accountancy. In 2008, Paige successfully completed the requirements to become licensed as a Certified Public Accountant in the State of Indiana. Paige joined Umbaugh in September 2003 as the Budget Services Coordinator. Since 2003, Paige has been involved with several professional engagements including financial studies for municipalities that often involved the determination of the impact of levies, tax rates and assessed values based on various scenarios arising from local or legislative initiatives. In addition, Paige has assisted numerous taxing units with budget preparation and capital planning.

Prior to joining the firm, Paige was employed as the Assistant Budget Director for the Department of Local Government Finance (DLGF). Over the five years Paige spent with the DLGF, her primary focus was on local government budgeting.

ITA TOWNSHIP ASSISTANCE CERTIFICATION – PLAZA "C"

This class will be taught by an experienced trustee and ITA Executive Director. You will learn township assistance from start to finish – from the development of your township standards and guidelines all the way through an Appeal - with the ITA Handbook and Standards as the class syllabus. We consider this an Introductory/Refresher class.

Presented by - Debbie Driskell is serving her 27th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 12th year as the ITA Executive Director. She has worked to live out her passion to see others be the best they can be in a job that is vital to the fabric of our communities.