

Tuesday, September 25 Classes

SESSION I – 8:30 AM – 9:45 AM

RED CROSS: MENTAL HEALTH AFTER A DISASTER – PLAZA A

THE RED CROSS PRESENTERS FOR THIS CLASS WERE DEPLOYED TO ASSIST WITH THE EAST COAST HURRICANE. WE ANTICIPATE THAT THE CLASS WILL STILL BE PRESENTED AND DETAILS WILL BE PROVIDED AT CONFERENCE.

WHAT YOU DON'T KNOW ABOUT YOUR FIRE DEPARTMENT & WHAT NO ONE IS WILLING TO TELL YOU! – PLAZA B

This session will discuss all types of fire departments (paid, volunteer, and combination). If you are not running your Fire Department, it may be running you. Topics will include everything from hiring, mutual aid, discussion points, egos, needs, OSHA, information that is vital that you know, and what you MUST expect from your department.

Presented By: Chief Mark Cromlich has twenty four years of service with the Carmel Fire Department. Appointed Chief in 2013, he has worked his way through the ranks to become a merit Captain and is currently in charge of safety and training for all sworn and civilian members of the department. He is the Indiana Advocate for the Everyone Goes Home Program through the National Fallen Firefighters and teaches firefighter health and safety throughout Indiana for The Department of Homeland Security, as well as at the Indiana Emergency Response Conference. He holds numerous All Hazards section specific certifications and trains with the Military at the FBI training center in Quantico, Virginia during WMD exercises responsible for safety. He received a bachelor's degree from Indiana University in 1993 and his Master's degree of Arts in Career and technical education, graduating summa cum laude with a perfect 4.0 from Ball State University in 2016.

MONTHLY UPLOADS – SBOA'S STRATEGIC VISION AND THE FUTURE OF AUDITING – PLAZA C

The State Board of Accounts (SBOA) have been working to adapt their audit process to improve the effectiveness and the quality of their audits. There have been major changes in technology and the auditing profession since the SBOA was formed. Many public accounting firms already have access to their client's data year-round. This allows them to perform audit procedures remotely, minimize on-site audit time, resulting in lower fees charged to perform the audit. The monthly upload requirements outlined in State Examiner 2018-1 is the first phase in SBOA's strategic vision to provide higher quality audits effectively. This class will include an overview of the directive, why these changes are necessary, and a tutorial of the new Gateway application and how to comply with these requirements.

Presented by: Chase Lenon was born and raised in Kokomo, Indiana, where he attended Northwestern High School. He graduated from Ball State University with a Master's in Accountancy and immediately started working for the SBOA. He began auditing State Agencies and moved to the role of advising schools and townships. He lives in Indianapolis with his wife Rebecca and his two spoiled dogs.

PROTECTING YOUR TOWNSHIP AGAINST IDENTITY THEFT – SUITES 4/5

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.

TOWNSHIP BOARD MEMBER TRAINING – SUITES 6/7

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 is proud to represent Senate District 17, which serves all of Wabash County and portions of Grant, Huntington and Whitley counties. In the Senate, Zay is a member of the following Senate Committees: Agriculture; Education & Career Development; Insurance & Financial Institutions; and Natural Resources. He has also served as the Huntington County Republican Party's Treasurer and Vice-Chairman. Some of Andy Zay's accomplishments include: Half Century Award – awarded by Governor Mitch Daniels for Indiana companies for longevity and community service, Optimist of the Year Award – awarded to member who portrays themselves most as a "Friend of Youth," Charlie Crowl Award for Commitment to Youth at Huntington Catholic School, EZ Williams Award for Commitment to Youth Sports at Parkview Huntington YMCA. In addition to his duties in the part-time legislature, the Senator manages Zay Leasing & Rentals Inc., a third generation, family-owned and operated business since 1953. Senator Zay and his wife, Cindy were both born and raised in Huntington, Indiana. Zay and his wife raised their five children Joe, Corinne, Rees, Meredith, and Isaac in Huntington County. The Zay family enjoys being outdoors, spending time together, and participating in sports. The Zays are active members in the Saints Peter & Paul Parish where the Senator serves as President of the Legacy of Faith Campaign, Booster Club and an usher.

WEEDS & FENCES – SUITES 8/9/10

This class will introduce you to the state laws pertaining to weeds and 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.

INVESTIGATORS' ROUNDTABLES – SUITES 13/14

HEAVY CASELOADS

Facilitated By:

Dominique Dickey is the Director of Support Services and has been at Wayne Township (Ft. Wayne) since 2016 working as an investigator until about June of this year.

Austin Knox came to the Wayne Township Trustee office in January of 2015 and also started as an investigator and was moved to the Director of Support Service then to Chief Deputy Trustee.

They have both worked in investigations and continue to work with their investigators through signing cases when needed and approving or denying tough cases.

MODERATE CASELOADS

***Facilitated By:* Jan McCrory** grew up in Henryville, Indiana. She graduated from Taylor University with a B.A. in sociology. Prior to working for the Delaware Township Trustee, she was employed as a caseworker for the Department of Public Welfare, first in Grant County, and then in Hamilton County. Afterwards, she spent several years as a Human Resources

manager for an electronics firm. She has been employed at Delaware Township, Hamilton County, since 2002. Jan is married, has a daughter, son-in-law, and two grandchildren.

SMALL CASELOADS

Facilitated By: **Michelle Junkins** has been with Adams Township, Hamilton County for 19 years. She is the Deputy Trustee, Investigator, and Clerk for the township. She loves her small town and enjoys being able to help those in need. She also serves as the president of the Town of Sheridan Planning Commission and the secretary/treasurer for Sheridan Main Street, Inc.

SESSION II – 10:00 AM – 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:

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 28th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 13th 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.

WHAT YOU DON'T KNOW ABOUT YOUR FIRE DEPARTMENT & WHAT NO ONE IS WILLING TO TELL YOU! – PLAZA B

This session will discuss all types of fire departments (paid, volunteer, and combination). If you are not running your Fire Department, it may be running you. Topics will include everything from hiring, mutual aid, discussion points, egos, needs, OSHA, information that is vital that you know, and what you MUST expect from your department.

Presented By: **Chief Mark Cromlich** has twenty four years of service with the Carmel Fire Department. Appointed Chief in 2013, he has worked his way through the ranks to become a merit Captain and is currently in charge of safety and training for all sworn and civilian members of the department. He is the Indiana Advocate for the Everyone Goes Home Program through the National Fallen Firefighters and teaches firefighter health and safety throughout Indiana for The Department of Homeland Security, as well as at the Indiana Emergency Response Conference. He holds numerous All Hazards section specific certifications and trains with the Military at the FBI training center in Quantico, Virginia during WMD exercises responsible for safety. He received a bachelor's degree from Indiana University in 1993 and his Master's degree of Arts in Career and technical education, graduating summa cum laude with a perfect 4.0 from Ball State University in 2016.

MONTHLY UPLOADS – SBOA'S STRATEGIC VISION AND THE FUTURE OF AUDITING – PLAZA C

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Presented By: **Chase Lenon** was born and raised in Kokomo, Indiana, where he attended Northwestern High School. He graduated from Ball State University with a Master's in Accountancy and immediately started working for the SBOA. He began auditing State Agencies and moved to the role of advising schools and townships. He lives in Indianapolis with his wife Rebecca and his two spoiled dogs.

WORKING WITH THE IHEDA HOUSING SUPPORT PROGRAMS – SUITES 4/5

An examination of the housing and housing support programs offered by the Indiana Housing and Community Development Authority (IHEDA). The panel features IHEDA staff members that work with the Indiana Foreclosure Prevention Network (IFPN), Energy Assistance Program (EAP), Lead Protection Program (LPP), Owner-Occupied Repair (OOR) program and the Housing Choice Voucher (HCV) program. Additionally, as the collaborative applicant for the

Indiana Balance of State Continuum of Care (BoSCoC), the panel will highlight programs that serve individuals in a housing crisis or are homeless.

Presented By:

Mark Neyland is Director of Asset Preservation with IHCD. He oversees the Indiana Foreclosure Prevention Network (IFPN) and Indiana's Hardest Hit Fund foreclosure prevention assistance program. Neyland earned a Bachelor of Science in Police Administration from Eastern Kentucky University and worked as a police officer in Alton, IL before earning his Juris Doctor degree from Vanderbilt University Law School in Nashville, TN. After Law school, he worked as a public defender in Lexington, KY and then as Assistant Inspector General in the Tennessee Office of Inspector General. Prior to joining IHCD, he worked as Senior Counsel with Ice Miller, LLP in Indianapolis. Neyland is licensed to practice law in Indiana, Kentucky, and Tennessee.

Samantha L. Spergel has worked at IHCD since January 2016 as the Director of Real Estate Production, where she oversees the Agency's allocation policies on the HOME Investment Partnerships Program Grant, Community Development Block Grant (CDBG) and CDBG-Disaster Recovery Housing Activities, the National Housing Trust Fund, and the Lead Protection Program – HUD programs which focus on constructing and preserving affordable housing across the State of Indiana. Samantha previously worked at the City of Indianapolis – Department of Metropolitan Development for three years, where she held several positions. She has spent her career becoming well-versed in housing policy, gaining extensive experience working with a variety of HUD programs and researching vacant and abandoned property issues. Samantha holds a Bachelor of the Arts in Political Science from The College of Wooster, and a Master of Public Affairs from Indiana University.

Greg Stocking is the Housing Choice Opportunities Manager at the IHCD. As the manager, Greg oversees all Housing Choice Voucher program operations which comprises the majority of IHCD's Section 8 rental assistance programs as well as HUD's Tenant Based Rental Assistance program and Indiana's Housing First program. Under Greg's leadership, IHCD assists over 35,000 families pay their rent each month. For his outstanding work and commitment to customer service, Greg was selected by his peers as IHCD's Employee of the Year in 2016. Prior to joining IHCD in 2014, Greg administered HUD programs for the City of Indianapolis for several years. Greg is a graduate of Indiana University with a Bachelor's degree in Public Management and a Master's degree in Public Policy Analysis.

Lori Wood has been the Coordinated Entry Analyst for IHCD since 2017. Lori attended Indiana Central University (University of Indianapolis) with an educational focus on Accounting, Finance and Marketing. Her professional career consists of 25 years in retail banking from 1982 – 2008. In 2008 Lori set out on a new career path and decided to turn a painful past as a domestic violence survivor and homeless single mother into living hope for others. For 6 ½ years Lori served as an Advocate and Case Manager for Sheltering Wings Domestic Violence Shelter where she created the curriculum as well as facilitated the weekly "Embracing Empowerment" support group for domestic violence survivors. She is a certified Sexual Assault Advocate and has spent many hours with hospitalized victims as they went through the reporting process. Lori then moved into the HMIS Master Trainer position with IHCD and began working directly with homeless service and domestic violence providers.

Rachel Woods has been with IHCD since 2016 and currently serves as the Community Programs Coordinator. As the Coordinator, Rachel works closely with sub-grantees for our Energy Assistance Program (EAP), Weatherization (Wx) and Community Service Block Grant (CSBG) programs. Specifically, with the EAP, her capacity-building and technical assistance helps ensure more than 100,000 households receive assistance each year. She also plays a critical role in the evolution of EAP into a truly paperless, "people-first" program.

PROVIDING EMPLOYEE BENEFITS – SUITES 6/7

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 retirement (PERF), health insurance, and other options. Our ITA attorney will share what must happen first in order for the township to begin benefits.

Presented By:

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 Bachelor’s degree in Business from the University of Colorado and a Master’s degree in Management from Regis University of Denver.

Trevor Stephens began his insurance career with American United Life in Indianapolis shortly after graduating from college. He started on the ground floor and quickly started his climb up through the ranks eventually to the sale office where he consistently hit goals and achieved quota. From there Trevor spent years moving around employee benefits educating himself in everything from TPA’s and networks to ancillary benefits and enrollment. In March of 2015 Trevor came to Brown & Brown of Indiana as an Account Executive working in the public entity sector where he serviced clients and cross sold the existing block. After leaving for a short period to learn the clinic business, Trevor has come back to Brown & Brown Indiana backing up the Account Executives in the public sector as well as overseeing ancillary sales, the existing clinic block and data analytics.

Kayleigh Moreau is a Field Administration Support for Empower Retirement and solely covers the Hoosier S.T.A.R.T. Plan. In her role Kayleigh supports Hoosier S.T.A.R.T. Advisors, local government, and State employees. During her year and a half with the organization, Kayleigh has created and developed numerous ways to make participant experience efficient. Kayleigh holds an MBA from Keller Graduate School of Management. She is involved with habitat for humanity and Freedom Service Dogs of America.

PUBLIC SECTOR EMPLOYMENT – AVOIDING SERIOUS PROBLEMS – SUITES 8/9/10

This session will generally 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. It will also provide participants a framework and tools with which to approach workplace and sexual harassment training for organizational leaders. 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 with Faegre Baker Daniels LLP’s Labor & Employment practice group. In 2014, Matt returned to the Indiana State Personnel Department as Employee Relations Counsel and, later, as Interim Director of Talent Acquisition. Matt currently serves as Deputy Director of Operations for the State Personnel Department and is responsible for the HR operations of the Executive Branch of state government.

Britni Saunders - In September of 2017, Britni was appointed by Governor Holcomb to serve as the Director of the Indiana State Personnel Department, the centralized HR service responsible for the Executive Branch of Indiana state government. Over the course of her 4 years with the State of Indiana, Britni has worked in a variety of HR and training-related leadership positions at the Indiana Department of Transportation. Prior to working for the State of Indiana, Britni spent 10 years with Starbucks Coffee Company as an Indiana-based retail operations leader specializing in employee development & engagement, customer service, and community involvement. Britni is a certified Human Resources Professional through the Society of Human Resource Management.

CLERKS’ ROUNDTABLE – SUITES 13/14

Facilitated By: Heather Willman is a lifelong central Indiana resident who has worked at the Delaware Township Trustee’s office in Hamilton County in some capacity since high school and has held the Clerk position for 11 years. While attending Taylor University, she received her degree in Business Administration, minoring in Math. Heather has volunteered with the high school youth ministry at her church for 15 years, loves rock climbing, and spends much of her free time spoiling her six nieces and nephews.

SESSION III – 12:45 PM – 2:00 PM

WORKING TOGETHER IN A CRISIS: RED CROSS/ HOMELAND SECURITY – PLAZA A

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Presented By:

Mary Moran has been the Disaster Recovery Director for the Indiana Department of Homeland Security for 2 years. During her 18 year career with the state she has worked for both the State Emergency Management Agency and its most recent incarnation as the Indiana Department of Homeland Security, as a program coordinator, State Hazard Mitigation Officer, and Mitigation Section Chief. She has assisted with the response and recovery to over 30 presidentially declared disasters. Mary received her Certified Emergency Manager certification from the International Association of Emergency Managers and has received my Bachelor's degree in Criminal Justice and a Master's in Public Safety, both through Indiana University. Mary has two daughters and four amazing grand kids.

WHOSE CEMETERY IS THIS? – PLAZA B

“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 lifelong interest in history, family history, and research. She earned her Bachelor's in Public History from Ball State University, where she studied also anthropology and American Studies. She has her Master's 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.

PAYROLL TIPS FOR PAINLESS PROCESSING – PLAZA C

This workshop will cover the responsibilities of Township Trustees with respect to payroll processing and filing requirements; and, it will also provide an update and resources for maintaining public records, storage & retention requirements and rules governing public record destruction. Presentations will be provided by a seasoned firm of CPAs and Consultants, as well as by representatives of an outside payroll / HR service provider. Based upon the positive feedback from ITA's 2017 Conference, this topic is being provided once again by ITA for its Members. The presentation will include relevant updates pursuant to the Tax Reform Act of 2017.

Facilitated By:

Otto W. “Buzz” Krohn, Executive Partner, O. W. Krohn & Associates, LLP - Buzz Krohn is a 1978 graduate of Indiana University's Kelley School of Business (BS in Accounting). He became a Certified Public Accountant (CPA) in 1981 and has also fulfilled the international accounting and consulting requirements to become a Certified Global Management Accountant (CGMA). After spending 8 ½ years with a regional CPA firm that focused on local government finance and utilities, O. W. Krohn & Associates was conceived in 1986. O. W. Krohn & Associates provides accounting and financial consulting services to virtually all units of local government, including: accounting, financial reporting, assistance with

DLGF budgets, prep for SBOA audit and/or compliance requirements, cost of service studies, utility rates, economic development initiatives, management consulting and assistance with the issuance of municipal bonds & leases.

Rosy Oshry - Sr. Consultant & Project Manager - O. W. Krohn & Associates, LLP - Rosy, a graduate of Indiana University's Kelley School of Business, joined the firm's consulting group in 2001 after spending 15 years in the financial & investment banking environment. Rosy holds a Bachelor of Science degree in Finance from I.U. and has expertise in local government finance, accounting, budgeting, DLGF reporting matters and tax-exempt financing. Rosy plays a key role in quality control activities for the Firm and has been exposed to all our practice specialties, including the issuance of long-term debt, utility sales & acquisitions, economic development incentive projects, TIF and utility and local government financial reporting requirements. She is the Firm's primary quality reviewer for Financial Due Diligence Reviews for the Indiana Finance Authority's State Revolving Fund (SRF) Program.

Gabrielle "Gabby" LaMere - Associate District Manager, ADP- Gabby is a native of Carmel, Indiana. After graduating from Guerin Catholic High School, she went to Xavier University in Cincinnati to play division one soccer. After her freshmen year at Xavier, she transferred to Purdue University to continue her athletic and academic career. She continued to play collegiate soccer while majoring in Sales Management and minoring in Organizational Leadership. She helps businesses of all sizes, working strategically with business owners and management to help manage cash flow, attract and retain employees, and reduce risk. Gabby is also involved with many other services provided by ADP, including: Payroll, HR and Compliance Services, Time and Attendance Tracking, Retirement Plans, Worker's Compensation, and Health and Benefits. At the end of the day, she is simply connecting with business owners and management to help pick out the perfect solution for their specific needs.

Cory Slade, Sales Executive - ADP Small Business Services

Cory is a lifelong Hoosier, born and raised in Indianapolis. He graduated from Marian University with a B.A. in Psychology and a B.S. in Marketing. He now resides in Hamilton County with his wife, and 4 children. Cory's hobbies are spending time with his kids and coaching their sports teams. He has worked at ADP for almost 5 years in a District Manager position and now in a Sales Executive position managing a team of 10 District Managers. In his time at ADP he has worked with a diverse group of businesses spanning across industries and size. ADP has a wealth of resources and services to help all types of business. ADP is a leader in the human capital management industry

WHOSE BUSINESS IS THIS? IN PUBLIC ACCESS COUNSELOR – SUITES 4/5

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. If you have never taken this class, it is highly recommended for all trustees, board members and clerks!

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.

EFFECTIVE BOARD GOVERNANCE – SUITES 6/7

Board members are the fiduciaries who steer the organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, as well as by making sure the organization has adequate resources to advance its mission. This workshop will overview the legal roles and responsibilities of board members and best practices in board governance. This class will be applicable, not only to township boards, but any board on which you may serve.

Presented By: Carey W Craig is the National Service Program Manager at Prosperity Indiana, formerly the Indiana Association for Community Economic Development (IACED). In his capacity, Mr. Craig oversees the Indiana Assets and Opportunity Corps – AmeriCorps Fellowship Program and supervises the Volunteers in Service to America project. From 2002-2012, he served in various leadership positions with Indiana's Commission on Community Service and Volunteerism. Prior to joining Prosperity Indiana, he was principal of The Craig Group, a management and consulting firm for small to medium-sized community- and faith-based organizations and associations. After studying history and

political science at the University of Indianapolis, Carey received a prestigious Indiana Governor's Fellowship where he spent one year assigned to special initiatives in the Offices of the Governor and Lieutenant Governor and the State Budget Agency.

BRAIN INJURY: THE INVISIBLE DISABILITY – SUITES 8/9/10

Brain injury affects 8.5% of the general population in the United States, but 40-70% of people with addictions issues, criminal justice involvement, or who have experienced homelessness or domestic violence have experienced one or more brain injury. Left untreated and without the appropriate supports, people get worse over time, and yet the nature of brain injury interferes with accessing services. This training will provide a basic understanding of brain injury, including causes and effects, as well as how to screen for brain injuries, improve effectiveness of your services for people with brain injuries, and an overview of brain injury-specialized services that can help.

Presented By: Jean Capler, MSW, LCSW, is the Local Support Network Leader in Southern Indiana for the Resource Facilitation Department of the Rehabilitation Hospital of Indiana. In this position, she works to improve the lives of brain injury survivors by building capacity in communities. She provides trainings on brain injury and resource facilitation to individuals who have experienced brain injury, their families, and to providers in the community who may serve those individuals in a variety of capacities. She has experience working in mental health, addictions, and as an employment consultant. Jean is committed to improving services for people with brain injuries by helping their service providers become more knowledgeable about brain injury and more effective in identifying and working with survivors.

STATE BOARD OF ACCOUNTS RESOURCE TABLE – SUITES 13/14

Facilitated By:

Chase Lenon was born and raised in Kokomo, Indiana, where he attended Northwestern High School. He graduated from Ball State University with a Master's in Accountancy and immediately started working for the SBOA. He began auditing State Agencies and moved to the role of advising schools and townships. He lives in Indianapolis with his wife Rebecca and his two spoiled dogs.

Billy S. Spurlock, CPA, graduated from Ball State University in 2012 with a Master's Degree in Accounting. He then spent almost two years in public accounting before transitioning into his position as a Field Examiner with the Indiana State Board of Accounts in 2014. Since then he has served in an array of positions and performed myriad function within the agency. He currently resides in Fishers with his wife and two daughters.

NEW TRUSTEE ROUNDTABLE – SUITES 13/14

This roundtable is for trustees who have taken office within the past year.

Facilitated By: Debbie Driskell is serving her 28th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 13th 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.

INVESTIGATORS' ROUNDTABLE – SUITES 13/14

Facilitated By: Dannelle (Danni) Lamprecht, is the mother to 3 children. In college, she first studied communications and later, legal research and writing. She worked in the field of law as a paralegal before meeting Lisa Pierzakowski, the newly elected Center Township Trustee in LaPorte, and began working in her office. Danni enjoys her job very much as she assists the residents and fellow neighbors. She believes in what their office does for people to help them change their lives, to help them want more for their children and their children's children. She works to break the cycle of enabling residents and empower them through education and job seeking assistance among many other skill sets.

SESSION IV – 2:15 PM – 3:30 PM

TRAUMA SENSITIVITY TRAINING – PLAZA A

This session will explore trauma sensitive service provision. Participants will recognize that trauma sensitivity is not a specific type of service, but a shared set of principles that place trauma at the center of our understanding of those with whom we work. The presenter will provide information to implement Trauma Informed Care as an organizational structure that involves understanding, recognizing, and responding to the effects of all types of trauma. Trauma Informed Care also emphasizes physical, psychological, and emotional safety for both consumers and providers, and helps survivors rebuild a sense of control and empowerment.

Presented By: Susan Ferguson has worked in human services for more than 25 years. During that time, she has worked in youth residential, family preservation, foster care, mental health, and school based programs. In the past 10 years, she has worked specifically with victims of domestic violence, sexual assault, and other crimes in both residential and non-residential settings. Ms. Ferguson has a Bachelor's Degree in Psychology and Master's Degrees in Counseling and Business. She is currently the Executive Director for Prevail, Inc. Prevail, Inc., located in Noblesville, is committed to offering crisis intervention and restorative support services for adult, adolescent, and child survivors of crime and abuse, free of charge, in a confidential, supportive, non-judgmental environment that is meant to empower, educate, and strengthen those we serve.

CEMETERY CARE & RESTORATION WITH JOHN "WALT" WALTERS – PLAZA B

This class is always packed with attendees who hear Walt explain the dos 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.

CASE MANAGEMENT 101: STANDARDS OF PRACTICE FOR BEST OUTCOMES – PLAZA C

This course is offered to identify and hone the skills and knowledge base required when case management becomes necessary. Skills ranging from interviewing and assessment—to teaching, advocacy, resource referral, negotiation, and documentation—are all important features of good case management, with the understanding that each of these also requires expertise in critical thinking and communication in order to be effective. A guest elder law attorney, Clifton Dennis, will explain key points of adult guardianship for situations when cases become more challenging.

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 extensively in the publishing industry in the greater New York area, writing and developing materials for McGraw-Hill and Pearson. Kate holds degrees in nursing and sociology, and certificates in gerontology and faith community nursing.

Clifton Dennis is a member of the Indiana Bar Association and the Indianapolis Bar Association, as well as the National Association of Elder Law Attorneys.

WHOSE BUSINESS IS THIS? IN PUBLIC ACCESS COUNSELOR – SUITES 4/5

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. If you have never taken this class, it is highly recommended for all trustees, board members and clerks!

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.

INSURANCE – WHAT IS REQUIRED? WHAT IS OPTIONAL? – SUITES 6/7

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 cybercrime, 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 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.

SBOA MANDATES & TOMSWEB SCREEN CONSOLIDATION: IMPROVING OFFICE EFFICIENCY! SUITES 8/9/10

Net Results introduces its new, all-in-one time/notes/assistance screen. We've set out to streamline 3 of the most utilized screens into one, easy to use data input page to improve efficiency and allow a more seamless flow. In addition, we will cover the SBOA monthly reporting/bank balancing mandates and some of our best tips for software utilization.

Presented By: Bill Costa has worked for Net Results and with Indiana townships for over 22 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.

Vendor-sponsored classes allow our business supporters to showcase their services & products.

STATE BOARD OF ACCOUNTS RESOURCE TABLE – SUITES 13/14

Facilitated By:

Chase Lenon was born and raised in Kokomo, Indiana, where he attended Northwestern High School. He graduated from Ball State University with a Master's in Accountancy and immediately started working for the SBOA. He began auditing State Agencies and moved to the role of advising schools and townships. He lives in Indianapolis with his wife Rebecca and his two spoiled dogs.

Billy S. Spurlock, CPA, graduated from Ball State University in 2012 with a Master's Degree in Accounting. He then spent almost two years in public accounting before transitioning into his position as a Field Examiner with the Indiana State Board of Accounts in 2014. Since then he has served in an array of positions and performed myriad function within the agency. He currently resides in Fishers with his wife and two daughters.

BOARD MEMBER ROUND TABLE – SUITES 13/14

Facilitated By: Rick Fain is the current President of the Delaware Township Board, Hamilton County. He was first elected to the Board in 2014. Prior to that he has served as Precinct Committeeman since 2000. In his professional life Mr. Fain works as a Technology Advisor starting in 1993 for the Converged Communications Group at Van Ausdall & Farrar, Inc.

SESSION V – 3:45 PM – 5:00 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.

CEMETERY CARE & RESTORATION WITH JOHN “WALT” WALTERS – PLAZA B

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TAKING YOUR TA-7 TO THE NEXT LEVEL – PLAZA C

The expanded TA-7 can be a mystifying document. It can also be a valuable, simple to read and simple to prepare report that establishes a fair estimate of the value your township provides to your community. Do you operate a food pantry? Do you contribute to a sheltering organization? When you negotiate with a landlord do you claim that as a value for service? Did you know when you refer a client to another agency you have created a value for your township to claim? Perry Township, Monroe County (Bloomington) has been out front on collecting and presenting data to their community on what the Township really does. No more of that “Taxes-received/Taxes-spent” attempt to justify your existence. Perry regularly and legitimately reports values of services up to 7 times the value of cash spent. These are reports anyone can make and they can give you a basis and talking points for explaining what we do and why we are an important community based stop on the social service path.

Presented By: **Dan Combs** has been the Trustee of Perry Township, Monroe County (Bloomington) since 1987. When he took office the entire set of township records was found in an unused shower stall in the rural house where the Township Office had been located. Since that time Perry Township has been at the forefront of Township rejuvenation in the state of Indiana. Combs led the effort to create one of the first private/public cooperative efforts to create a 24-hour a day shelter for homeless individuals in the state, as well as a second initiative to house a “no-questions-asked” community based soup kitchen. Since that time Combs and Perry Township have created numerous other partnerships to provide services for Senior Citizens Housing, Released Offenders from the Township Jail, and wholesome dietary foods through a food pantry designed for expectant or new mothers.

HOMELESSNESS & TRANSITIONAL HOUSING – SUITES 4/5

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 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 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 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.

FUNDING FIRE PROTECTION – SUITES 6/7

Ideas for increasing your fire protection revenue: get the most out of your property tax levy, obtain levy increases, increase your income tax distributions, and file for more reimbursements from Medicaid. Did you know that most townships are eligible to recover under-billed property tax revenue and unclaimed property tax levies? Come learn from experienced township accountants.

Presented By:

Curtis L. Coonrod is a certified public accountant whose practice involves services to Indiana local governmental financial management. His work involves helping clients understand and deal with the regulatory framework within which local government operates in Indiana. His clients are Indiana municipalities, counties, and townships. His work includes budgeting and planning for these entities. Mr. Coonrod was elected County Auditor of Marion County in 1986 and served until 1990. He also served two terms on the City-County Council and was chairman of its administration and finance committee. Previously he served as assistant national director of governmental accounting and auditing for a national accounting firm.

Stephanie L. Lilly provides services to local units of Indiana government. Her clients are primarily Indiana townships, municipalities and non-profits. She collaborates with her clients to help them best deal with the both the intricacies of the state regulation of local government in Indiana and the practical carrying-out of unit policies and procedures. Ms. Lilly specializes in preparing comprehensive fiscal projections to help her clients understand the impact of state regulations and individual unit policies on their long-term financial health.

STRATEGIC PLANNING FOR EMPLOYEE BENEFITS: LIABILITY AND RISK OR ASSET AND OPPORTUNITY – SUITES 8/9/10

How do you and your organization view your employee benefits plans? Do you view them as required expenses out of your control? Or as strategic opportunities to create competitive advantage at your organization? Have you heard of association health plans or other group buying opportunities in Indiana? Join us for a discussion of how to expand your thought process from one of limits to possibilities and new thoughts on these costs and the basics to setting a strategic plan for these benefits for the long-term. Discussion will focus on the opportunity to create a township group buying opportunity across multiple township organizations across Indiana.

Presented By:

Cory Johnson specializes in employee benefit planning and focuses on providing employers with valuable advice and strategies for cost saving and cost containment. He works extensively with non-profits, municipalities, and trusts. Cory is a 2004 graduate of DePauw University in Indiana with a BA in Philosophy and was member of the Management Fellows Honors Program. He received his MBA from the University Of Chicago Booth School Of Business with a focus on Strategic Management and Entrepreneurship in 2010.

Jaren Hornbeak brings a fresh perspective on effective communication, problem-solving and strong listening skills to team JA. He believes that helping clients solve their problems is his calling and has adopted the catch-phrase, "Tell me your problems, I'm listening!" Jaren received his Bachelor's Degree in Communication from Hanover College where he was a member of the Business Scholars Program. He is also a Licensed Producer of Life, Accident, and Health Coverage and has his Health Plan Navigation Certification and HIPAA Privacy Certification.

Vendor-sponsored classes allow our business supporters to showcase their services & products.

Wednesday, September 26 Classes

SESSION C – 8:30 AM – 1:00 PM

TOWNSHIP ASSISTANCE CERTIFICATION – PLAZA A

This class will be taught by an experienced trustee and ITA Executive Director, along with an investigator/caseworker. 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:

Jan McCrory grew up in Henryville, Indiana. She graduated from Taylor University with a B.A. in sociology. Prior to working for the Delaware Township Trustee, she was employed as a caseworker for the Department of Public Welfare, first in Grant County, and then in Hamilton County. Afterwards, she spent several years as a Human Resources manager for an electronics firm. She has been employed at Delaware Township, Hamilton County, since 2002. Jan is married, has a daughter, son-in-law, and two grandchildren.

Debbie Driskell is serving her 28th year as the Delaware Township Trustee in Hamilton County (Fishers) and her 13th 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.

CONTRACTS, POLICIES & AGREEMENTS CERTIFICATION – WORKING WITHIN THE LINES – PLAZA B

This class will cover most of the legal documents that are involved in provided township services. Learn what policies and contracts MUST be in place in the trustee's office and which MUST involve the township board. Seminar will include community service contracts and travel policies. Samples will be provided as part of the class.

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.

PUBLIC RELATIONS CERTIFICATION– PLAZA C

As public servants, we deal directly with constituents and it is important that we handle ourselves appropriately. Trustees are required to use other resources available to meet the needs of their clients. This requires networking and sharing your mission with others. This course will be presented in three distinct sections:

PART 1

Panel discussion with PR Professionals on getting your message out

Kate Snedeker-moderator, corporate communications consultant

Carrie Cason - communications consultant

Tammy Sander - PR professional

Karen Avery - media director Indiana Assn of Counties

PART 2

Panel discussion on how to tell your story using the media: hints, dos, don'ts, what kinds of stories resonate, how to build a relationship with a reporter

Kate Snedeker-moderator, corporate communications consultant

Steve Greenburg - owner of The Current

Chris Sikich - reporter Indy Star

Niki Kelly - reporter Fort Wayne Journal Gazette

PART 3

Communications Must-Haves for Every Township

Learn how to be an effective communicator to your constituents with important tips and tools in the areas of communications law basics, crisis communications, media relations, and effective social media use. Gain insights from real-life media experiences, dealing with social media trolls, understanding public records requests, handling crises and much more.

Presented By: Susan Haynes is the Communications Director for Mooresville Schools with vast experience in corporate, nonprofit, and school public relations. She is also the President of the Mooresville Chamber of Commerce, a certified Indiana School Safety Specialist, and a board member of the Community Foundation of Morgan County as well as the

Indiana School Public Relations Association. Her district was recently named by eSchoolNews as one of ten districts in the nation with Awesome School Brands.