

November  
2007

# Quest



## Retha's Reflections



**Retha  
Hicks**  
IAMC, MMC  
President  
ILMCT



**H**ello everyone! Your officers and Executive Committee members have been working very hard for you. We met at the IACT Conference to discuss establishing a foundation for the league. This initiative would allow league members to make a tax free donation for educational scholarships for our members. Also, the foundation will assist in raising the status of our league to a higher professional level. We will keep you updated on the progress of this project. Thank you to London Witte Group and Barnes and Thornburg; as they are providing assistance pro bono.

I would like to take this opportunity to publicly thank Mitch Ripley, HR Unlimited, for his commitment to our league. He and Gary Whorlow's leadership and guidance in our education program are invaluable but the level of their commitment to us is beyond words. Mitch and Gary led our leadership retreat and challenged each and every one of us to be a fully committed team. Despite nature, we had a very successful event, the fruit of which was shown at our Educational Committee meeting a few weeks ago. The level of participation and sharing of ideas were beyond my expectations. Every committee member felt they were an important and vital component of the group; hence, they felt comfortable enough to share; which was our goal. Thank you, Gary and Mitch.

There are other colleagues that have been working hard for us. A big thank you to Suzy Bass, Jeffersonville Chief Deputy, for coordinating the ILMCT Breakfast held at the IACT Conference. We had a wonderful turnout for the event. Thank you to Umbaugh for sponsoring the breakfast. Thank you to Debbie Block for obtaining sponsors for the clerk's reception at the IACT Conference. Umbaugh and Ice Miller were gracious enough to sponsor that event for us.

As the election draws near, I challenge everyone to communicate any information in regards to new clerks. It is hard to lose our friends and colleagues to an election.

We need to assist in educating the newly elected to the best of our ability, so we are asking that you send their information to: [winonaclerk@kconline.com](mailto:winonaclerk@kconline.com). Jan Unger and Jennifer Shell, Co-chairs of the Mentor Committee, are working very diligently to develop material to send to the new clerks and clerk-treasurers. But we need your assistance to reach every colleague. Thank you.

The 2008 Conference will be held in beautiful and historical Evansville, IN, June 8<sup>th</sup> through the 12<sup>th</sup>. The Conference Co-Chairs, Kay Brown, Kackie Chrapliwy, Janet Jaros and Deb Twitchell have some exciting events planned for the evenings and relevant educational workshops during the day. The host hotel is the beautiful Casino Aztar Hotel with overflow accommodations at the Le Merigot. Both hotels are located next to the Ohio River.

If you have an issue or thoughts about the league, please contact one of the league officers so we may address it. You have heard me say this before, but this is your organization and we are here to serve you.

Take care , *Retha*

### Indiana League of Municipal Clerks & Treasurers ELECTED LEAGUE OFFICERS

<b>President</b>	<b>Retha Hicks, IAMC, MMC Clerk-Treasurer - Winona Lake</b>
<b>Vice-President</b>	<b>Larry Breese, IAMC, CMC Clerk-Treasurer - Greenfield</b>
<b>Secretary</b>	<b>Laura Baker, IAMC, CMC Clerk-Treasurer - Etna Green</b>
<b>Treasurer</b>	<b>Dave Shafer, IAMC, CMC Clerk-Treasurer - Munster</b>
<b>Immediate Past President</b>	<b>Robin Riley, IAMC, CMC Clerk-Treasurer - Hometown</b>

*The following is the letter the league sent to the Governor's Blue Ribbon Committee on your behalf:*

**W**e want to thank you for your commitment to study local government reform. We want to take this opportunity to share some of our thoughts and suggestions for your consideration.

All essential services are critical for the operation of cities and towns. Municipalities are the commercial, industrial, educational, economic, and governmental base for Indiana. In order to provide a stable economic base, local government provides certain services: public safety; transportation; street repairs, construction, lighting and maintenance; trash and recycling services; parks and recreation; utilities – water, electric, wastewater and storm sewer; economic development; zoning issues; and repair and replacement of critical infrastructure.

Our goal is to establish and maintain a strong and stable economic base and a quality of life for our citizens (including public safety, economic vitality and health). Units of municipal government are best able to customize the levels of service that best suit the day-to-day needs and demands of its citizens. One size does not fit all. Each community is unique. The needs and desires of each community differ from one another. Individual identity, freedom of choice, and desire to maintain control of local decisions are very important. Government serves its people and its services should be specific to the people's needs.

We are providing the services yet have little control over funding, management and efficiency. State regulations make management difficult, hinder efficiency and cooperation between governmental entities, require excessive amounts of documentation, and consume much time and resources of municipalities. For many years, municipalities throughout the state have entered into interlocal cooperation agreements with other taxing units (schools, libraries, and other municipalities) to purchase a variety of goods (for example, road salt, gasoline and diesel fuel, street painting equipment, and sewer maintenance equipment) and services (for example, shared employees, ambulance service, street paving contracts, and police gun ranges). Impediments have included private-sector competitors who desire to break up purchasing blocs in order to maximize their profit, and citizens who resist having their tax dollars being used to benefit those outside of the community. Give us the freedom to work together within counties for interlocal agreements to provide services; to enter into purchasing consortiums; and to operate as efficiently as possible. Services mandated by the state should be funded by the state and services provided by local government should be funded locally.

Clerk-Treasurers have taken the lead in providing our constituents e-government services (community website for more efficient distribution of information, which leads to a more open governmental process; online registration for parks programs; online credit card payments; "point of sale" credit card payments; and other electronic services). To quote an analogy of a fellow colleague – Michael Griffin, Highland – "It has been observed that Councils are the steering wheel; Mayors and Town Managers are the accelerator; and Clerk-Treasurers are the brakes." Clerk-Treasurers have to maintain independence so we may apply the brakes at the appropriate time.

The corporate world is beginning to recognize that personal service and human interaction are missing from their structure of business. The trend is swinging back to providing SERVICE. The general population is responding favorably and positively to businesses that give them personal care. Relating this to the government realm – small communities generally have a leaner and more efficient structure. Citizens have the ability to voice their opinions and local government has the responsibility to interact with and be responsible to them. Development of larger units of government creates a complex that loses accountability. As we have stated throughout this missive, give us the tools to provide efficiency and we will rise to the challenge.

Three changes that are most critical to creating leaner, more effective local government in addition to the above comments are enabling better use of financial information for management purposes; allowing cities and towns to exercise true constitutional home rule; and assuming greater responsibility and accountability to their constituents for generation and utilization of revenue to provide services that are locally generated and delivered. This would include the ability to establish locally (county wide or by community) an income tax, sales tax, food and beverage tax, or innkeepers tax, etc.

Thank you for your consideration of our thoughts. If you have any questions, please don't hesitate to contact us.



Time for Lunch



Fun & Games



Happy to be Heading Home

# Leadership Retreat



Class Time



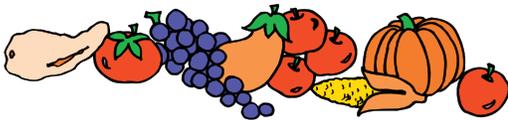
All About Trust



Follow the Leader



Coming to a Close



Enjoying the Break



Congratulations to Rennata Berkshire, Jennifer Shell, Deb Workman and Vicki Hargis for receiving their next level of certification in the Municipal Management Institute with IACT.



## We Extend Our Sympathy

Janis Dever, Windfall Clerk-Treasurer, had battled cancer for several years prior to her death on September 25.

Father of former Clerk Kim Forker, Kendallville, passed away September 24. He follows Kim's mother who passed away six months earlier.

Clerk-Treasurer Judy Cochran of Oakland City passed away in mid August.

Retha Hicks' brother, Gary Livingston, died August 23.

Walkerton Clerk-Treasurer Penny Perry passed away September 2. She is at peace after fighting a great battle.

# Local Government Pool Getting Even Closer

Richard E Mourdock  
Indiana State Treasurer

## Ask Charlie

[cpride@sboa.in.gov](mailto:cpride@sboa.in.gov)



Charlie  
Pride  
State Board  
of Accounts

**Q** May a bank charge a service charge to the city or town on the bank accounts the city or town maintains with the bank?

**A** Yes. IC 5-13-9-8 states that any investing officer that makes a deposit in any deposit or other account may be required to pay a service charge to the depository in which the funds are deposited, if the depository requires all customers to pay the charge for providing that service. However, the service charge imposed must be considered in the computation of the interest rate for determining which depositories are entitled to investments in certificates of deposit. If the total service charge cannot be computed before the investment, the investing officer shall estimate the service charge and adjust the interest rate based on this estimate. The service charge may be paid by direct charge to the deposit or other account or in any other manner mutually agreed upon by the investing officer and the depository.

**Q** May a clerk or a clerk-treasurer of a city or town solemnize a marriage which is to take place outside the city or town's limits?

**A** Yes. However, the location of the wedding must be within the county where the clerk's or clerk-treasurer's city or town is located. (See IC 31-11-6-1)



Dan Jones  
Department of  
Local  
Government  
Finance

## Ask Dan

[djones@dlgf.in.gov](mailto:djones@dlgf.in.gov)

**Q** Why does the DLGF continue to approve budgets and tax rates that increase from year to year? Why doesn't the DLGF stop these tax increases?

**A** The role of the DLGF according to IC 6-1.1-17-16 is to review tax supported budgets by fund, rate, and levy. The DLGF has the responsibility of enforcing the maximum property tax levy controls as approved by the General Assembly. A budget may be lowered or denied by the DLGF only if the unit is exceeding those levy controls or there are insufficient funds to support the budget.

In August the State Treasurer's Office provided the *Quest* with an article about our upcoming Local Government Investment Pool. Since that time, we've received a number of calls asking when the pool will be up and running? What will the interest rate be? What are the deposit minimums, minimum time for deposits? etc. The answer is.... We're getting closer but still aren't quite there yet.

But much has happened since last summer. Our advisory board (consisting of three clerk-treasurers, three county treasurers, three members of IASBO and four members of the State Treasurer's staff) compiled and issued an RFI asking vendors to detail how they might construct the electronic "platform" to host the site and provide ease of access to local officials. They were also directed to provide specific details on how the investment package might be constructed to provide users with the best possible returns on investment. Vendors were also asked for their thoughts in dealing with the necessary liquidity requirements and maintaining compliance with the statute that requires 50% of the funds to be in deposit accounts of Indiana institutions. Frankly, when the proposal went out, we were hoping to receive four, maybe five responses.

Three weeks later, no less than *sixteen proposals* were wheeled through the State House to arrive on our door step. Large multi-national institutions provided proposals as did smaller regional firms with very specialized packages of service. It was a very difficult several weeks reading through the documents and getting a sense of who could best serve our needs. Though the task was difficult it confirmed that the market is very, very competitive and this is of course, why we began this process: to bring more competition to the market for public funds.

We can now report, the list has been whittled down to just four proposals. The four firms will be interviewed before the entire review committee in mid-October. In short, now the easy work is done and it is getting much, much harder but as I frequently remind my staff, the pressure for funds is so great on local governments that anything we can do to help raise their interest income is worth the effort.

You'll be hearing more about Indiana's Local Government Investment Pool as we approach our projected start-up date of January 1, 2008. Thanks for your continuing support!

# Plan to Take Advantage

## Indiana League of Municipal Clerks and Treasurers & HR Unlimited Resources

### CONTINUING EDUCATION OPPORTUNITIES 2007

Nov. 30-Dec.2 IIMC Region V Meeting Franklin, Tennessee

### CONTINUING EDUCATION OPPORTUNITIES 2008

March 9-14	ILMCT/HR Unlimited Resources	13th Annual Institute/Academy
May 18-22	IIMC 62 <sup>nd</sup> Annual Conference	Atlanta, Georgia
June 8-12	72 <sup>nd</sup> ILMCT Annual State Conference	Evansville, Indiana

**Kay's  
Korner**

**Kay Brown  
IAMC, MMC,  
CPFA**

**ILMCT  
Education/  
Professional  
Growth  
Committee  
Co-Chair**

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*\*In order to obtain the Indiana Accredited Municipal Clerk (IAMC) designation, you must be a member of the Indiana League of Municipal Clerks and Treasurers.*

*\*In order to obtain the Certified Municipal Clerk (CMC) designation or Master Municipal Clerk (MMC) designation, you must be a member of the International Institute of Municipal Clerks.*

*\*In order to obtain the Certified Public Finance Administrator (CPFA) designation, you must be a member of the Association of Public Treasurers of the US & Canada*

## Financial Management Award

On Monday, October 9<sup>th</sup>, Deb Twitchell received the 2007 Financial Management Award from IACT at the annual conference awards luncheon in Evansville. Deb started her career as Clerk-Treasurer in Orland, before moving to Angola to take a position with the City of Angola.

Deb became Clerk Treasurer for the City of Angola in 1996. Under Deb's direction, Angola has been able to purchase property for use as city hall and renovate the public safety building without outside financing, establish direct deposit for employees and maintain 10 years of clean audits with the State Board of Accounts. Deb serves on the Executive Committee for the ILMCT, as well as the co-chair for the 2008 conference. She has also served as co-chair on the Education Committee and has been a mentor for many. Deb also serves on the IACT Executive committee, Legislative Committee, Finance and Budget Committee, Municipal Finance Committee and the Newly Elected Officials Training Content Advisory Committee.



Deb has received her designations of Indiana Accredited Municipal Clerk, Certified Municipal Clerk and Certified Public Financial Administrator. She is also enrolled in the Master Municipal Clerks Academy and is working toward her Master Municipal Clerk certification. *Congratulations, Deb!*

# Warsaw / Winona Lake

## Public Art Project

Submitted by  
Retha Hicks

What an exciting time for Kosciusko County and our two local communities – Warsaw and Winona Lake. What a great project for our community. Winona Lake’s “Heritage Trail”, is a portion of the “Lake City Greenway”. The trail is 1.8 miles long and it meanders through the Village At Winona artisan’s shops; travels next to the lake and canal; through the town park; along a creek and then into a wooded area.

After an IACT workshop on “Public Art”, I presented the idea to my Council and the Winona Lake Greenway Art Commission was developed. Our first project was to locate ten sites along Winona Lake’s trail for commemorative benches and fine art to be donated by generous community members. Each site has a theme such as – Kindness, Community, Peace, Heritage, etc. The art sites are a beautiful compliment to Heritage Trail while adding to the overall artistic cultural essence that resonates throughout Winona Lake, Indiana.

On September 11, 2007, the site titled “Peace” located right next to the lake in the town park was dedicated in memory of those who gave their life on 9/11. The donor for the bench retired from American Airlines as a flight attendant. Six of her former co-workers were killed during the terrorist attacks. “They, as well as their families, are always with me in my thoughts and prayers, and today is a special day to reflect on the military who allow us to have freedom to live our daily lives,” Rita Gesaman said.

As Linda and Yadi were installing their piece, they found a renewal in their spirit. They are from a highly populated area and came to work in a small community where everyone was interested in their work and in them. One evening they were shopping in a local grocery store and someone saved their spot in the check out line. In the hustle and bustle of their large community, they are literally ignored and treated as a non-entity but our community took them into their hearts and lives. So our town gained a beautiful

piece of artwork and new friends; Linda and Yadi found faith in the human race.



## Artists’ Concepts . . .

### The Peace Sundial

*I chose the concept of a sundial because of the ancient timekeeping method. This method is not perfect and it is dependent on God’s will. Each day is a gift given to us by God. We each receive the same measure of time; what we do with it is our choice. Peace is made up of many components that we as humans try to control, change or share. If you look around, you will see what God’s perfect will is. He will provide everything that you need to survive, and it will be in his time (KAIROS-Greek). All things will be clearer.*

*The hands carved out of ceramic on the dial are different nationalities and ages to represent the many people of our world. We are all made of clay and will return to dust when we die- we are all equal -deserved of love and respect.*

Linda Doyle

### The Peace Sundial and Freedom Base

*When I think of September 11, 2001, I can only focus on Rebirth; not only the rebirth our nation; but the future of our children also. The mosaic base represents freedom. After taking a poll of several individuals on their reaction to the visible reminder of 9/11, it was clear that the focus should be on the future of our children and the rebirth of our nation.*

*The trees represent the twin towers, as they are the tree of life pushing us to a new beginning. The birds, circling the trees, takes us on a journey for peace and freedom; in hopes of moving us toward a new beginning by creating a better and safer world for our children.*

*As you round the sculpture we greet the viewer with the symbol of hope by creating a facsimile of the new Freedom Tower to be erected in lieu of the Twin Towers that is guarded by the return of the American eagle.*

*The green surreal circle represents the sun at sunset and sunrise. This symbolizes the beginning and ending of visible time. The sundial can only be read between 6:00 am (sunrise) to 6:00 pm (sunset).*

*During the time spent in our installation of the Peace and Freedom sculpture we had the opportunity to get to know so many of the residence of this small lake town. The sculpture began to change as we became engulfed in this community; thus we made a decision to incorporate the community by adding the hand prints of the local youth.*

Nadine Royster (Yadi)

# Breakfast Honoring Retirees

The ILMCT breakfast was held on Tuesday, October 9<sup>th</sup>, at the IACT annual conference in Evansville. Our breakfast was sponsored by Umbaugh and we would like to extend a special thank you to them.

This was an amazing breakfast this year. We enjoyed listening to the Honorable Indiana State Treasurer, Richard Murdock. Brenda Young, as our new director of Region V, gave us an update. Janice Malinowski and Jayne Deckard also gave updates on the District meetings that would be held soon.

Our highlight of the breakfast was honoring our 2007 Retirees. As they went through the receiving line they were congratulated by the current officers, Dave Shafer, Laura Baker, Larry Breese and President, Retha Hicks. They continued through the receiving line with the awarding of a beautiful decanter presented by State Treasurer, Richard Murdock, with past president Robin Riley completing the receiving line. What a memorable gift, the decanter was made of lead crystal and engraved with their initials and the league logo.

The morning was heartfelt and emotional. Our congratulations go out again to Beverly Armstrong, Rennatta Berkshire, Carol Beaman, Marilyn Chittick, Wanda Chupp, Margaret Drewniak, Barbara Ewing, Brenda Flickinger, Sharon Gammon, Helen Gerke, Dave

Harner, Tom Hoffman, Jauna Harshman, Nancy Hewitt, Wyatt Holesapple, Kathy Juillerat, Donald McClintock, Bettye Norris, Connie Pearson, Treeva Sarles, Beverly Stout, Ted Spurlock, Nellie Thompson and Pam Updike.



## IACT Newly Elected Officials Training

Whether you are from a city or town, a new municipal official or veteran, IACT's Newly Elected Officials events, sponsored by Vectren, will provide valuable information and resources as you prepare for the coming term. Mark these important dates on your calendar today!

### Newly Elected Officials Conference

January 14-16 Indianapolis, IN (The Westin)

### Regional Newly Elected Officials Training

November 28, 2007 Merrillville, IN (Radisson Star Plaza)  
November 29, 2007 Fort Wayne, IN (Fort Wayne Conference Center)  
December 3, 2007 Jasper, IN (Habig Center)  
December 4, 2007 Columbus, IN (Harrison Lake Country Club)  
December 5, 2007 Lebanon, IN (Quality Inn & Suites)

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## Steuben County Clerk-Treasurers Stepped Up to Help Out



On July 25, 2007, several town and city Clerk-Treasurers helped the County Treasurer and Auditor staff envelopes with Steuben County tax bills. Rhonda Engle of Orland, Tammy Onofrietti of Angola, Tatsy Hayes of Hudson and Karen Grieser of Hamilton (pictured) as well as Deb Twitchell of Angola and Judy Manahan and Liz Sova from her staff.

# Indiana League of Municipal Clerks and Treasurers

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## Quest

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### A note from the Editor . . .



**Kathy Parsons**  
IAMC, CMC,  
CPFA  
Editor

What a beautiful time of year! There is a unique feel to fall days. Warm days, cool nights, just a hint of fall fragrances. It reminds you of childhood memories with pumpkins, hayrides and cider. Lots and lots of cider!

And a reminder of what is to come, the very busy holiday season! Take this time to enjoy the fall days, enjoy the colors, take a walk, carve a pumpkin, go for that hay ride and drink cider. Lots and lots of cider!

