

2025 MASBO SUMMER CONFERENCE & NEW SBO ACADEMY - SCHEDULE AT A GLANCE

Great Falls Heritage Inn - Breakout Rooms									All-Member Meetings and Exhibitors	
	Canadian	Britain	American	Montana & Alberta	Lewis & Clark	Missouri	Room 201	Room 200	Convention Area and Sun Terrace & Balcony	
MONDAY JUNE 9										
8:00 - 5:00	New School Business Official (SBO) Academy- Shay Baize & Melissa Bartelt, MASBO		AIM Workshop- Get the Low Down on State Reporting 2025- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM						Lunch for Pre-Conference & New SBO	
TUESDAY JUNE 10										
8:30 - 5:00	Black Mountain Software User Group Meeting 9-5		Tyler Technologies Users- School ERP Pro User Group Meeting 9 - 4		C&C School Accounting Software User Group 9-4		AIM- Drop in as needed for assistance			
1:00 - 5:00							CRISS Fingerprint Capturing Certification 1-5			
4:00 - 6:00	REGISTRATION in Convention Area									
4:00 - 7:00	MASBO Board Meeting in room 200									
7:00 - 9:00	Pre-Conference Welcome Mixer sponsored by Montana Cooperative Services (MCS) in Convention Area									
WEDNESDAY JUNE 11										
8:00 - 3:00	REGISTRATION in Convention Area									
8:00 - 4:00	MUST WELLNESS in Russell Meeting Room									
8:00 - 2:00	Exhibitors Set Up in Convention Area & Sun Terrace									
8:30 - 9:30	Requests & Rosters: Schedule Your Students Effectively, Saving Your District Money & Agony- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM	Tuition Laws, Concepts & Budget Impact- Andrea Mohammadi, OPI Tuition	General Law Overview & Employment Standards Division Support- Karla Ivie, Dept of Labor Wage & Hour	2024 Takeaways & 2025 Predictions: Benefit Trends that Drive Recruitment & Retention- Scott Florsheim & Brandon Sharon, American Fidelity	Strategic Planning from a Finance Perspective- Tony Gerharz, Wipfli	Winning Strategies for E-Grants: Access, Roles & Common Errors- Dan McNurlin, OPI	Board Meetings, Notices & Minutes- Elizabeth Kaleva, Kaleva Law	MT Co-Op Meeting & Training- Karmen Tesarek, Central MT Learning Resource Center		
9:40 - 10:40	OPI School Finance STARS- Autumn Warren, Laci Novark, Alivia Skeslien-Jenkins & Cori Opie, OPI School Finance	Personnel Reporting in AIM- Nicole Thuotte, OPI- AIM	Ready, Set.....Audit- Susan Nicosia CPA, LLC	Preparing for a Dept. of Labor Inspection? - Brodie Loushin, MSPLIP	Using AI Driven Tech to Navigate Towards the Safety Culture of the Future- Shawn Bubb, MSGIA	Planning, Budgeting, Constructing, and Maintaining School Facilities- Matt Thompson & Karen Heglin, McKinstry	AI in Public Sector Procurement- Nancy Burns, Equalis			
10:50 - 11:50	Student Activity Fund Currents of Change- Carrie Fisher, TJ Marmon, Dustin Zuffelato & Stacy Montgomery, MASBO Student Activities Committee	Pupil Transportation- Donell Rosenthal, OPI- Pupil Transportation	E-Grants Requests, Pesky Pop-Ups, Coding & Consistency- Catlin Clifford, OPI	How AI can Improve our Facilities Departments?- Pat Buchanan, Operations Hero	Stopping Fraud Before It Starts: Defending District Resources- Nyles Greer, Felt Martin PC	TRS for SBOs- Nolan Brilz & Darla Fitzpatrick, TRS	Risk Assessment & Cybersecurity ROI- James Krippes, Schoolhouse IT & Dawn Van Zandt, Big Sky Cybersecurity			
12:00 - 2:30										LUNCH, OPENING SESSION & KEYNOTE SPEAKER
2:30 - 3:00										BREAK / VISIT EXHIBITORS

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3:00 - 4:00	Campus Connection: Navigate the Whole New World of Infinite Campus- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM	Pupil Transportation- Donell Rosenthal, OPI- Pupil Transportation	MD&A Discussion- Susan Nicosia	From Chaos to Clarity: Managing Tech Budgets and Inventory- Jeff Patterson, K12 Montana	Medicaid Administrative Claiming- Laurie Nelson, DPHHS & Peter Gilles & Joseph Weber, PCG	TRS Legislative Updates- Nolan Brilz & Darla Fitzpatrick, TRS	Criminal Records: Reading the RAP Sheet- Mernie McCarl, CRISS	Onboarding Tips for New PERS Employees & Optional Member- Terry Dalton, MPERA	
3:00 - 4:00	Certification Testing in Meeting Room 108								
4:30-4:45	Attendees Load Buses to Golf Course or Museum								
5:00 - 7:00	Golf Scramble at Anaconda Hills Golf Course								
5:00 - 7:00	C.M Russell Tour								
7:00 - 9:30	Attendee Dinner in Convention Area								
THURSDAY JUNE 12									
6:30 - 7:30									Awaken and Align with Gentle Sunrise Yoga- Keri Sansaver, M. Ed
7:30 - 8:30									VISIT EXHIBITORS
8:00 - 3:00	REGISTRATION in Convention Area								
8:00 - 4:00	MUST WELLNESS in Russell Meeting Room								
10:00 - 7:00	SUNSHINE FUND SILENT AUCTION in Convention Area								
8:30 - 9:30	OPI School Finance Medley- Autumn Warren, Laci Novark, Alivia Skeslien-Jenkins & Cori Opie, OPI School Finance	Understanding Fund Reserves- Mike Waterman, Bozeman Public Schools	Navigating Regulatory Change in Child Nutrition Services- Lindsey Palmer, Chartwells	Reducing Your Risk: The Power of a Dependent Audit- Scott Florsheim & Brandon Sharon, American Fidelity	Schools Health Insurance Trust- John Doran, Montana School Insurance Alliance	Fun with FRAM, CEP & EBT- Tamera Blanchard, SSOM	Spreadsheets Tips and Tricks 1- Adam Milligan, Milligan School Data	Ready to Retire for Defined Benefit Members- Terry Dalton, MPERA	
9:40 - 10:40	BMS Annual DYK Session- Lindsey Taylor & RaLynn Brown, Black Mountain Software	Tuition in MAEFAIRS Demo- Andrea Mohammadi, OPI Tuition	General Law Overview & Employment Standards Division Support- Karla Ivie, Dept of Labor Wage & Hour	Unemployment 101- Laren Carparelli, MTSUIP	Understanding Your Financial Statements- Tony Gerharz, Wipfli	School ERP Pro User Group Meeting- Diana Betancourt & Carrie Hughes, Tyler Tech	Spreadsheets Tips and Tricks 2- Adam Milligan, Milligan School Data	C&C Software Meeting- David Bardwell, C&C	
10:40 - 11:00									
11:00 - 12:00	MHSA Tournament Accounting & Arbiter Review- Jenise Cockhill, MHSA	You talkin' to me?!?!? Communicating With Your Public- Lacy Clark and Mike Waterman, Bozeman Public Schools	Maximizing the Use of DCA- Alie Wolf, OPI- SNP Data Analyst, and Bitsey Draur, OPI-SNP IT Program Manager	Rody's Top 10- Rody Holman, MSPLIP	Work Comp 101: A 'Dust Off' and Focus on First Report of Injury- Annette Satterly, MSGIA	Stress Reduction in the Workplace- Keri Sansaver, M. Ed	Spend Dynamics Best Practices & P-Card Q&A- Holly Wallace, IASBO	IDEA Fiscal- Kimber Emmons & Danni McCarthy, OPI SpEd	
12:00 - 1:30									LUNCH, BUSINESS MEETING & AWARDS
1:40 - 2:40	MASBO Certification Program Overview & Prep- Colleen Drury, Melissa Bartelt, Karsen Floerchinger, Jen Mettler, and Lacey Porrovecchio, MASBO Certification Committee	Personnel Reporting in AIM- Nicole Thuotte, OPI- AIM	School Nutrition Programs 101- Rachel Ariaz, OPI-SNP Specialist and Alie Wolf, OPI-SNP Data Analyst	Improving School Facilities: Overview of the Capital Planning, Bond Election and Bond Financing Process- D.A. Davidson & Co., Dorsey & Whitney LLP	Schools Health Insurance Trust- John Doran, Montana School Insurance Alliance	Cooperative Purchasing: Helping You Save Money!- Larry Crowder, MCS	SpEd & IDEA MOE- Sharie Lewis, CPA, SFO - Parkrose School District	Basic Navigation in ERIC- Terry Dalton, MPERA	

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2:40 - 3:00									BREAK / VISIT EXHIBITORS
3:00 - 4:00	Maintenance Of Effort- Karmen Tesarek, Central MT Learning Resource Center	KEY aspects for involving parents and community members in school advocacy- Brian Patrick, GPS, Jamie Marshall & Sheila Kelly, KEY Group	Navigating the Jungles of ESEA- Zach Hawkins; OPI Title I/Federal Programs Director	Employee Wellness Programs- Lacy Clark, Bozeman School District	Maximize your Medicaid Reimbursement for School-Based Services- Lisa Waterman, SSOM & Kelley Cole, RELAY	Chair Yoga- Keri Sansaver, M. Ed	Spend Dynamics Best Practices & P-Card Q&A- Holly Wallace, IASBO	Traffic Education Data and Reporting System (TEDRS)- Mike Houghton & LeAnn Haas, OPI Traffic Education	
3:00 - 4:00	Certification Testing in Meeting Room 108								
6:00 - 9:00									DINNER & BINGO
FRIDAY JUNE 13									
8:00 - 11:00									69th Montana State Legislature School Finance Review 2025- Paul Taylor, OPI & Debra Silk, MTSBA
11:00-11:30									CLOSING SESSION & PRIZE DRAWINGS
HAVE A SAFE TRIP HOME! SEE YOU NEXT YEAR, JUNE 15-19 AT THE BILLINGS HOTEL & CONVENTION CENTER									