

2025 MASBO SUMMER CONFERENCE & NEW SBO ACADEMY - Session Descriptions

Time	Room	Topic	Description
MONDAY, JUNE 9			
8:00 - 5:00	Canadian/Britain	New SBO Summer Academy- Shay Baize & Melissa Bartelt, MASBO	New SBO Summer Academy! Join us for a full day of learning and fun. You will get to connect with other New SBOs and gather a ton of valuable information along the way!
8:00 - 5:00	American	AIM Workshop- Get the Low Down on State Reporting 2025- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM	An all-day session covering Rolling Calendars, Enrollment Nuances (including Early Literacy, Extracurricular, and Home School), Requests & Rosters, Course Setup, Staffing, STARS, and Accreditation Woes.Audience: District Clerks, Techies, and State Reporting Staff
TUESDAY, JUNE 10			
9:00 - 5:00	Canadian/Britain	Black Mountain Software User Group	A fun interactive day that will allow you to build connections with your peers while learning more about BMS!
9:00 - 2:00	American	Tyler Technologies User Group	School ERP Pro User Group Meeting: Come & Connect with fellow colleagues, learn new facets/updates on the software, share best practices and learn how to use the system more efficiently, including Tips-n-Tricks and answering questions.
9:00 -4:00	Montana/Alberta	C&C School Accounting Software User Group	Meeting for users of C & C School Accounting Software.
8:00 - 5:00	Missouri	AIM Drop in	Come by the room and get assistance with AIM entries, etc. No appointment necessary, come by and say hi.
1:00-5:00	Room 201	CRISS Ink Fingerprint Capturing Certification- Mernie Mccarl, CRISS	CRISS Ink Fingerprint Capturing Certification Class
WEDNESDAY, JUNE 11			
8:30 - 9:30	Canadian	Requests & Rosters: Schedule Your Students Effectively, Saving Your District Money & Agony- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM	Dive into the Campus tool responsible for ALL of your elementary scheduling and 80% of your 7-12 scheduling. Learn tips and tricks to make life easier, Filter like a wizard saving time. Have scheduling done in hours/days vs. weeks/months (Audience: District Clerks, Techies, and State Reporting Staff)
8:30 - 9:30	Britain	Tuition Laws, Concepts & Budget Impact- Andrea Mohammadi, OPI Tuition	Let's take a tour through the details of Tuition from beginning to end. Focus will be on data entry, reports, compliance, special education, and how it affects the budget.
8:30 - 9:30	American	General Law Overview & Employment Standards Division Support- Karla Ivie, Dept of Labor Wage & Hour	This workshop is comprised of general information to provide insight and clarification regarding Wage and Hour laws and their application to school districts.
8:30 - 9:30	Montana/Alberta	2024 Takeaways & 2025 Predictions: Benefit Trends that Drive Recruitment & Retention- Scott Florsheim & Brandon Sharon, American Fidelity	With 2024 in the rearview mirror comes the gift of hindsight. We've gathered claims experience, participation data and survey feedback specifically from your industry. This session will deliver insights into what's trending in benefits that could help with your recruitment and retention strategies, what's next with SECURE Act 2.0, and solutions in artificial intelligence and beyond.
8:30 - 9:30	Lewis/Clark	Strategic Planning from a Finance Perspective- Tony Gerharz, Wipfli	In this session, we will explore strategic planning from a finance perspective, focusing on the unique challenges faced by school districts. Participants will learn how to develop a flexible and adaptive approach that can respond to constant changes in staffing, funding, and more. We will discuss change management and resiliency strategies and provide actionable tips for maintaining a constantly renewed strategic plan.
8:30 - 9:30	Missouri	Winning Strategies When Using E-Grants- Dan McNurlin, OPI- IT Systems Analyst	This interactive session will focus on understanding E-Grants "rules". The topics covered will be accessing and navigating E-Grants, terms, and definitions, finding, and using E-Grants how to guides and videos, understanding error messages and successfully submitting and amending grants. Participants should be prepared to ask questions and share winning strategies with colleagues.
8:30 - 9:30	Room 201	Board Meetings, Notices & Minutes- Elizabeth Kaleva, Kaleva Law	An in-depth look at the obligations and responsibilities of the Clerk/Business Manager in ensuring your Board complies with Montana law regarding school board meeting procedures, including appropriate notices, posting, recording, etc.

8:30 - 9:30	Room 200	MT Co-Op Meeting & Training- Karmen Tesarek, Central MT Learning Resource Center	Cooperative Funding Sources, Budgeting, MOE, other topics as needed
9:40 - 10:40	Canadian	OPI School Finance STARS Act- Autumn Warren, Laci Novark, Alivia Skeslien-Jenkins & Cori Opie, OPI School Finance	Let's take a look at the new STARS Act or HB252. We will go over what to expect for FY 2026 and future years.
9:40 - 11:50	Britain	Personnel Reporting in AIM- Nicole Thuotte, OPI- AIM	Who are these people, what do I do with them and where does this information go? Your comprehensive guide to personnel reporting in Infinite Campus – and a mapping of how personnel data entered in Infinite Campus is used.
9:40 - 10:40	American	Ready, Set.....Audit- Susan Nicosia CPA, LLC	This session will provide participants with information on how best to prepare for a successful audit for both the school district and audit firm. Audit mysteries will be unveiled as we review audit requirements and process. Let's remove the dread of the audit.
9:40 - 10:40	Montana/Alberta	Preparing for a Dept. of Labor Inspection? - Brodie Loushin, MSPLIP	The MT Department of Labor is continuing to inspect Montana schools. The MSPLIP has a webpage with tools that can be immediately implemented to help our clients schools address a wide range of topics. These tools will help our clients implement and maintain a safe and compliant educational environment. The topics also serve to address many of the exceptions that have been noted in DOL audits. Presented by Brodie Loushin, Montana Schools Property & Liability Insurance Plan.
9:40 - 10:40	Lewis/Clark	Utilizing AI driven technologies to Navigate towards the Safety Culture of the future- Shawn Bubb, MSGIA	Join Shawn Bubb to observe how Ai driven tools are shaping the direction and speed of change in the delivery and creation of school based risk management content. This interactive and sometime comical display of Ai content generation tools will be an eye opener for school districts and present a new road map for school workplace safety plans.
9:40 - 10:40	Missouri	Planning, Budgeting, Constructing, and Maintaining School Facilities- Bob Moore, Matt Thompson & Karen Heglin, McKinstry	Representatives from McKinstry will discuss Design - Build procurement for renovation, infrastructure replacement, and affordable staff housing projects, including: School condition assessments, Long-range planning, Bond and building reserve election support, Design and engineering, Construction management, Commissioning, Preventative maintenance and service. The session will provide an overview of the turn-key progressive design-build process and explain the use of Design-Build procurement, based in Montana Codes 18-2-501 through 18-2-503.
9:40 - 10:40	Room 201	AI in Public Sector Procurement- Derek Anderson, Equalis	AI is transforming industries—including education procurement. The question isn't whether AI will reshape procurement, but how we'll adapt. Procurement professionals face critical challenges: selecting the right AI tools, training AI for effective use, and identifying where AI delivers the greatest impact. Equalis Group, a national cooperative purchasing organization, has spent over a year collaborating with public agencies to explore AI's role in procurement. We've tested platforms, refined prompts, and developed strategies to streamline RFP development and sourcing. Join us for a live demonstration showcasing how AI can help you create better solicitations faster, secure necessary products and services, and navigate complex procurements with ease. Whether tackling complex procurements, managing heavy workloads, or navigating unfamiliar categories, AI can be a game-changer. See it in action and learn how to apply AI in your procurement process today!
9:40 - 10:40	Room 200	MT Co-Op Meeting & Training- Karmen Tesarek, Central MT Learning Resource Center	Cooperative Funding Sources, Budgeting, MOE, other topics as needed
10:50 - 11:50	Canadian	Student Activity Fund Currents of Change- Carrie Fisher, TJ Marmon & Stacy Montgomery, MASBO Student Activities Committee	Join us for an engaging workshop focused on navigating the currents of change in student activity fund accounting. This session will feature interactive discussions, real-life scenarios, and practical strategies tailored to the challenges faced by fund custodians. We'll dive into updated the MASBO student activity manual and FAQ, ensuring you have a comprehensive understanding of best practices and compliance.
10:50 - 11:50	Britain	Pupil Transportation- Donell Rosenthal, OPI- Pupil Transportation	Let's review electronic transportation forms, reporting deadlines, and driver requirements.
10:50 - 11:50	American	E-Grants Requests, Pesky Pop-Ups, Coding & Consistency- Catlin Clifford, OPI	During this session we will cover updated "rules" for drawing down funds, creating expenditure reports, applying for indirect costs, and understanding error messages. Participants should be prepared to ask questions and share winning strategies with colleagues.
10:50 - 11:50	Montana/Alberta	How AI can Improve our Facilities Departments?- Pat Buchanan, Operations Hero	We hear the term AI everyday but how can it be used to help manage our facilities? We will dive into some of the transformative ways that AI models are being used to collect and improve data quality for facilities management and examine case studies into the opportunities, challenges, and exaggerations associated with AI. Some of the questions we'll answer: 1. How can technology be used to complete and track work more efficiently? 2. What are some of the ways AI/ML models can be useful for day-to-day facilities? 3. What is machine learning, and how can it be used to build better models?

10:50 - 11:50	Lewis/Clark	Stopping Fraud Before It Starts: Defending District Resources- Nyles Greer, Felt Martin PC	Taxpayers expect their tax dollars to be used for the education of students. Students and parents expect public funds be used properly. Theft of school resources, including fraudulent use of school funds, is a crime and a violation of the public trust. This session will focus on ways to protect school resources and be on the lookout for fraud in schools.
10:50 - 11:50	Missouri	TRS for SBOs- Nolan Brilz & Darla Fitzpatrick, TRS	TRS Accounting/Fiscal Manager Nolan Brilz will review TRS wage and contribution reporting requirements, including recent system and procedural changes that may affect you.
10:50 - 11:50	Room 201	Risk Assessment & Cybersecurity ROI- James Krippes, Schoolhouse IT & Dawn Van Zandt, Big Sky Cybersecurity	Are you a school business manager looking for ways to help safeguard your school? Attend our session to gain valuable insights into performing risk assessments and understanding their positive impact on cybersecurity ROI. Discover practical approaches to pinpoint your district's highest risks, effectively use funds to address these issues, and make smart spending decisions for maximum protection.
10:50 - 11:50	Room 200	MT Co-Op Meeting & Training- Karmen Tesarek, Central MT Learning Resource Center	Cooperative Funding Sources, Budgeting, MOE, other topics as needed
3:00 - 4:00	Canadian	Campus Connection: Navigate the Whole New World of Infinite Campus- Mary Anne Skinner, SSOM & Nicole Thuotte, OPI AIM	Let's connect to the Wonderful World of Infinite Campus Resources - Explore the New Look going live July 1st, your FREE access to Campus Community, the 411 on Submitting a Campus Support Ticket, why we pay for the YES Series and Campus Passport, and meet our Montana CRM Kelly Border. (Audience: District Clerks, Techies, and State Reporting Staff)
3:00 - 4:00	Britain	Pupil Transportation- Donell Rosenthal, OPI- Pupil Transportation	Let's review electronic transportation forms, reporting deadlines, and driver requirements.
3:00 - 4:00	American	MD&A Discussion: GASB Statement 103- Susan Nicosia, CPA	This session will cover the MD&A as updated with GASB Statement 103: Financial Reporting Model Improvements. GASB 103 is effective for fiscal years beginning after June 15, 2025 but early adoption is encouraged.
3:00 - 4:00	Montana/Alberta	From Chaos to Clarity: Managing Tech Budgets and Inventory- K12 Montana	Technology can be one of the biggest—and most unpredictable—line items in a school's budget. This session helps business managers bring order to the chaos with smart budgeting techniques and streamlined inventory control practices. Whether you're new to tech planning or looking to sharpen your process, you'll gain valuable insights and strategies to support long-term sustainability.
3:00 - 4:00	Lewis/Clark	Medicaid Administrative Claiming- Laurie Nelson, DPHHS & Peter Gilles & Joseph Weber, PCG	Understanding of Medicaid, Medicaid Administrative Claiming and How it Benefits the Schools.
3:00 - 4:00	Missouri	TRS Legislative Updates- Nolan Brilz & Darla Fitzpatrick, TRS	In this session, TRS staff will discuss recent or upcoming legislative changes that may affect TRS employers, members, and working retirees.
3:00 - 4:00	Room 201	Criminal Records: Reading the RAP Sheet- Mernie McCarl, CRISS	We provide the Criminal Record for a background check. You determine hiring eligibility by reading and interpreting it...seems simple enough, right? But have you ever looked at a RAP Sheet? It's hard! This class is here to help. We will cover Criminal Record basics, like verdict terms, severity, amended charges, how a Criminal Record is created and why it may be incomplete once you receive it. We will walk through a Montana RAP Sheet, noting the different and key information found in each section of a RAP Sheet. Between class discussion, in-class practice, and additional resources we will make you aware of, Montana Criminal Records & Identification Services Section wants to make sure you are comfortable and confident in Reading the RAP Sheet.
3:00 - 4:00	Room 200	Onboarding Tips for New PERS employees & Optional Members- Terry Dalton, MPERA	Come get helpful tips for anytime you hire a new PERS member! We will go over necessary documents for regular members, plus what to do with any optional employees.
THURSDAY, JUNE 12			
8:30 - 9:30	Canadian	OPI School Finance Medley- Autumn Warren, Laci Novark, Alivia Skeslien-Jenkins & Cori Opie, OPI School Finance	In this presentation we will be presenting on a variety of topics including Detailed Expenditures, Indian Education for All, ANB Reports, Deadlines, and more.
8:30 - 9:30	Britain	Understanding Fund Reserves- Mike Waterman, Bozeman Public Schools	It's been a busy legislative session! Fortunately, reserves haven't changed—but the increases afforded by HB15 and HB252 will have implications on them so it's important to understand how they work. Whether you're new to school finance and reserves or just need to refresh your knowledge, this workshop is for you!

8:30 - 9:30	American	Navigating Regulatory Change in Child Nutrition Services- Lindsey Palmer, Chartwells	Join Lindsey Palmer, MBA, MS, RDN, Vice President of Nutrition and Industry Relations, for an insightful session on navigating regulatory changes in child nutrition services. This session will provide a comprehensive overview of the current regulatory landscape and its impact on child nutrition programs. Attendees will gain valuable insights into the latest policy updates, compliance requirements, and strategies for effectively managing these changes within their organizations. Key topics to be covered include: Buy American Provisions, Food Dyes and Additives, Universal Free Meals and CEP, and Special Education and Wellness.
8:30 - 9:30	Montana/Alberta	Reducing Your Risk: The Power of a Dependent Audit- Scott Florsheim & Brandon Sharon, American Fidelity	Ineligible dependents on your medical plan could be unknowingly creating risks for your organization. If they're covered and incurring claims, climbing premiums might be on the horizon. A Dependent Verification Review is a cleaning effort to both save money and stay compliant.
8:30 - 9:30	Lewis/Clark	Schools Health Insurance Trust- John Doran, Montana School Insurance Alliance	Learn about progress made toward implementing House Bill 332, which allows school districts in Montana to pool together for higher-quality, lower-cost health insurance.
8:30 - 9:30	Missouri	Fun with FRAM, CEP & EBT- Tamera Blanchard, SSOM	In this session we will talk about how you can make your Infinite Campus efficiently perform required tasks for OPI School Nutrition. 1. FRAM and verification including all the shiny new tools now available!, 2. CEP setup and Tally Meal Entry, 3. Sun Bucks (formerly Summer EBT) and, 4. Food Service reports
8:30 - 9:30	Room 201	Spreadsheets Tips and Tricks 1- Adam Milligan, Milligan School Data	Spreadsheets Tips and Tricks 1: An introduction to working with spreadsheets. For those who are absolute beginners to working with spreadsheets. We'll cover different ways to efficiently enter data, discuss the differences of the basic data types, and work with some basic functions to let the spreadsheet do the work for you!
8:30 - 9:30	Room 200	Ready to Retire for Defined Benefit Members- Terry Dalton, MPERA	What you need to know about the retirement process in the Defined Benefit Plan even if you are a few years out from retiring.
9:40 - 10:40	Canadian	BMS DYK Session- Lindsey Taylor & RaLynn Brown, Black Mountain Software	BMS Annual DYK Session to be held on Thursday, June 12th from 9:40 a.m. to 10:40 a.m. in the Lewis Room at the Great Falls Heritage Inn.
9:40 - 11:50	Britain	Tuition in MAEFAIRS Demo- Andrea Mohammadi, OPI Tuition	"Tuition in MAEFAIRS Demo" will be a live demonstration of entering data to MAEFAIRS and reviewing the associated reports and views.
9:40 - 10:40	American	General Law Overview & Employment Standards Division Support- Karla Ivie, Dept of Labor Wage & Hour	This workshop is comprised of general information to provide insight and clarification regarding Wage and Hour laws and their application to school districts.
9:40 - 10:40	Montana/Alberta	Unemployment 101- Laren Carparelli, MTSUIP	Come and join us for an exciting review of Unemployment!
9:40 - 10:40	Lewis/Clark	Understanding Your Financial Statements- Tony Gerharz, Wipfli	In this session you will get an understanding on how the trustee financial summary is used in drafting district financial statements so that you are better able to take responsibility and provide the skill knowledge and experience to aid the auditors.
9:40 - 10:40	Missouri	School ERP Pro User Group Meeting- Diana Betancourt & Carrie Hughes, Tyler Tech	Montana School ERP Pro User Group Meeting: Come Connect & Collaborate with fellow colleagues, explore industry trends that impact your entity, share best practices, and learn how to use the software more efficiently, including Tips-n-Tricks and answering questions.
9:40 - 10:40	Room 201	Spreadsheets Tips and Tricks 2- Adam Milligan, Milligan School Data	Spreadsheets Tips and Tricks 2: Starting where we left off in "Tips and Tricks 1", we'll look at some more advanced functions (Vlookup, offset, SumIf, etc.), work with sorting and filtering, conditional formatting and data validation. We'll also take a beginning look at some of the graphs and data visualizations that spreadsheets offer.
9:40 - 10:40	Room 200	C&C Software Meeting- David Bardwell, C&C	Annual user meeting
11:00 - 12:00	Canadian	MHSA Tournament Accounting & Arbitrator Review- Jenise Cockhill, MHSA	A brief overview of tournament finances including review of financial reports and distribution of profits. A short overview of the Arbitrator management tool as it pertains to school registration
11:00 - 12:00	Britain	You talkin' to me?!?!? Communicating With Your Public- Lacy Clark and Mike Waterman, Bozeman Public Schools	While there's no 'right' or 'wrong' way to communicate with your constituents, it's imperative that good communication happens. We'll use this session to discuss and demonstrate some of the ways the Bozeman School District communicates important issues to our community.

11:00 - 12:00	American	Maximizing use of DCA - Direct Certification, CEP Eligibility, FRAPP Online Free and Reduced Applications and Sun Bucks Eligibility (aka Summer EBT/S-EBT)- Alie Wolf, OPI-SNP Data Analyst, and Bitsey Draur, OPI-SNP IT Program Manager	Attendees of this session will take a deeper dive of the Direct Certification Application (DCA) system functionality that's used to directly certify students' school meal eligibility benefits and qualify schools for CEP, how to sign-up for and use FRAPP-the online free and reduced Application housed within DCA and gain familiarity with SUN Bucks (previously Summer EBT) and what your school can do to help eligible students qualify.
11:00 - 12:00	Montana/Alberta	Rody's Top Ten!- Rody Holman, MSPLIP	Rody Holman will share enlightening stories of interesting claims administered by the insurance program over the past 25 years. Examples will provide you with information about what not to do in your schools.
11:00 - 12:00	Lewis/Clark	Work Comp 101: A 'Dust Off' and Focus on First Report of Injury- Annette Satterly, MSGIA	Join Annette Satterly and Brenda Koch, MSGIA School Risk Managers, as they provide a two-part workshop. A concise 'dust-off' refresher of the ins and outs of workers' compensation will flow into an interactive training focused on the First Report of Injury (FROI). Participants will have the opportunity to practice submitting a thorough FROI, develop an understanding and increased confidence of the investigative process, and have a better awareness of what to expect once a claim is submitted.
11:00 - 12:00	Missouri	Stress Reduction in the Workplace- Keri Sansaver, M. Ed	8 gentle shifts and simple habits to invite peace and wellness into your workday.
11:00 - 12:00	Room 201	Spend Dynamics Best Practices & P-Card Q&A- Holly Wallace, IASBO	Does your district use the MT ASBO p-Card program through BMO, or are you interested in the program? Come and join this interactive session on the online management tool Spend Dynamics and learn how to manage your district cards and transactions. We will also discuss best practices, and updates about the program. Please bring all your questions and concerns – we will answer them!
11:00 - 12:00	Room 200	IDEA Fiscal- Kimber Emmons & Danni McCarthy, OPI SpEd Division	The OPI team will discuss the grant application to include but not limited to: proportionate share tracking, budgets, allowable expenses/documentation, CCEIS funds. In addition the team will discuss fiscal monitoring for the upcoming years.
1:40 - 2:40	Canadian	MASBO SBO Certification Test Training- Colleen Drury, Melissa Bartelt, Karsen Floerchinger, Jen Mettler, and Lacey Porrovecchio, MASBO Certification Committee	MASBO Certification Program overview and test preparation. Presented by the MASBO Certification Committee, Colleen Drury, Melissa Bartelt, Karsen Floerchinger, Jen Mettler, and Lacey Porrovecchio.
1:40 - 2:40	Britain	Personnel Reporting in AIM- Nichole Thuotte, OPI- AIM	Who are these people, what do I do with them and where does this information go? Your comprehensive guide to personnel reporting in Infinite Campus – and a mapping of how personnel data entered in Infinite Campus is used.
1:40 - 2:40	American	School Nutrition Programs 101- Rachel Ariaz, OPI-SNP Specialist and Alie Wolf, OPI-SNP Data Analyst	Get ready for a fast-paced overview of the School Nutrition Programs. This class is perfect for new(er) clerks and business officials that want to gain perspective of what SNP covers. Attendees will learn the basic requirements to successfully operate School Nutrition Programs, where to find helpful resources to keep your district on track, how to prepare for an Administrative Review, requirements to maintaining your district's fund-12 account, meal counting and claiming, best practices with determining free and reduced meal eligibility through the certification and benefit issuance process, and utilizing the Direct Certification Application (DCA) system to save time and resources, qualify for CEP and help eligible students qualify for SUN Bucks benefits (previously Summer-EBT).
1:40 - 2:40	Montana/Alberta	Improving School Facilities: Overview of the Capital Planning, Bond Election and Bond Financing Process- Bridget Ekstrom & Crystal Vogl, D.A. Davidson & Co. Dan Semmens, Dorsey & Whitney LLP, Deb Anderson, Polson Elementary and HS Districts & Staci Auck, Hobson K-12 District	Are your School District's facilities in need of capital improvement projects? Do you see a potential need for bond financing in your future? If you are considering a big or small project and wonder where to start, this seminar will provide information for everyone including a bond market overview and helpful insights from Deb Anderson with Polson Elementary and HS Districts and Staci Auck with Hobson K-12 District who have recently worked through the capital planning, bond election and bond issuance process and are currently in the construction phases of their Projects.
1:40 - 2:40	Lewis/Clark	Schools Health Insurance Trust- John Doran, Montana School Insurance Alliance	Learn about progress made toward implementing House Bill 332, which allows school districts in Montana to pool together for higher-quality, lower-cost health insurance.
1:40 - 2:40	Missouri	Cooperative Purchasing: Helping You Save Money!- Larry Crowder, MCS	Join Larry Crowder from Montana Cooperative Services to learn how cooperative purchasing can help save you money!
1:40 - 2:40	Room 201	SpEd & IDEA MOE- Sharie Lewis, CPA, SFO - Parkrose School District	Please attend this session to learn more around Special Education and the Individual with Disability Education Act (IDEA) and Maintenance of Effort and the consequences if you fail.

1:40 - 2:40	Room 200	Basic Navigation in ERIC- Terry Dalton, MPERA	Join us for a high-level overview of the ERIC system.
3:00 - 4:00	Canadian	Maintenance Of Effort- Karmen Tesarek, Central MT Learning Resource Center	Expenditures, Allowed Exceptions, TFS, Reversion
3:00 - 4:00	Britain	KEY aspects for involving parents and community members in school advocacy: An example of successful engagement in Montana- Jamie Marshall & Sheila Kelly, KEY Group	Kids' Education Yes (KEY) is a non-partisan community group that has partnered with Great Falls Public Schools for decades to advocate for students, teachers, and public education. Led entirely by volunteer parents, grandparents, and business leaders, KEY has grown its role and impact over the years. In this session we will discuss ways KEY creates and facilitates meaningful community conversations about education: 1) Effective methods for gathering and assessing local education data, 2) Tools to create and share information with the community, 3) Strategies to build strong partnerships within the local community, 4) Approaches for fostering legislative awareness and relationships, and 5) Steps to use KEY as a model to strengthen advocacy efforts in other Montana communities
3:00 - 4:00	American	Navigating the Jungles of ESEA- Zach Hawkins; OPI Title I/Federal Programs Director	This session will assist school business officials in better understanding, utilizing, and reporting all the Title program funds in the ESEA Consolidated Application in the OPI E-Grants system. Critical topics will include program overviews, allocations, the application process, equitable share set asides, carryover, cash requests, and final expenditure reporting. There will also be time for Q & A at the conclusion of the session.
3:00 - 4:00	Montana/Alberta	Employee Wellness Programs- Lacy Clark, Bozeman School District	Ready to boost energy, morale, and create a sense of belonging? Join us for a lively look at how an Employee Wellness Program can transform school culture, support staff well-being, and keep your team feeling their best. We'll share real-life success stories, practical tools, and a few laughs along the way—because healthy educators make happy schools!
3:00 - 4:00	Lewis/Clark	Maximize your Medicaid Reimbursement for School-Based Services- Lisa Waterman, SSOM & Kelley Cole, RELAY	Are you making the most of School-Based Medicaid for your district? Whether you're already billing and looking to increase reimbursements, or you're just getting started, this session is for you. Join us for a practical and informative discussion designed for: Districts currently billing for School-Based Medicaid and seeking strategies to maximize their reimbursement potential Districts not yet billing but interested in exploring how to get started Districts that use educational cooperatives but employ paraprofessionals providing personal care services who want to learn how to access Medicaid funding You'll walk away with actionable insights, tools, and next steps tailored to your district's needs. Don't miss this opportunity to unlock new funding streams that support essential services for your students. Join us and take the first step toward maximizing your Medicaid reimbursements!
3:00 - 4:00	Missouri	Chair Yoga- Keri Sansaver, M. Ed	Chair Yoga is practiced seated in a chair or using a chair for support and is a form of yoga that is designed to be accessible for all ages and fitness levels.
3:00 - 4:00	Room 201	Spend Dynamics Best Practices & P-Card Q&A- Holly Wallace, IASBO	Does your district use the MT ASBO p-Card program through BMO, or are you interested in the program? Come and join this interactive session on the online management tool Spend Dynamics and learn how to manage your district cards and transactions. We will also discuss best practices, and updates about the program. Please bring all your questions and concerns – we will answer them!
3:00 - 4:00	Room 200	Traffic Education Data and Reporting System (TEDRS)- Mike Houghton & LeAnn Haas, OPI Traffic Education	TEDRS is used by school districts and traffic education teachers to submit required forms and reports related to driver education programs, ensuring compliance with state standards. This session highlights the roles, responsibilities, and deadlines of traffic education electronic reporting. These forms are used to determine and disseminate reimbursement funds to school districts with OPI approved teen driver programs.
FRIDAY, JUNE 13			
8:00 - 11:00	Convention Area	69th Montana State Legislature School Finance Review 2025- Paul Taylor, OPI & Debra Silk, MTSBA	With the close of the 69th Montana Legislative session this presentation intends to be a high-level review of bills that have passed into law. A summary of the bills that affect clerks and business managers will be examined with ample opportunity to ask questions throughout the presentation.
11:00 - 11:30	Convention Area	Closing Session	Closing speeches and thank you's, swearing in the board for FY26 and door prizes