

MASBO 2023 Summer Conference Course Descriptions

Recommended for New School Business Officials

Recommended for all attendees

Time	Room	Topic	Description
MONDAY, JUNE 12			
8:00 - 5:00	Bitterroot Sapphire	New School Business Officials	Please see separate agenda.
TUESDAY, JUNE 13			
9:00 - 5:00	Bitterroot	Black Mountain	A day filled with lots of information, tips and tricks to help you hone your BMS skills and make your daily processes more effective. Presented by Lindsey Taylor, Serina Nelson and Trinette Todd, Black Mountain Software.
9:00 - 4:00	Sapphire	C & C	Meeting for users of C & C School Accounting Software. Presented by David Bardwell, C & C Accounting.
9:00 - 2:00	Ponderosa	Tyler Technologies	School ERP Pro (Infinite Visions) 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. Presented by Diana B. Betancourt, Client Relations Manager, Tyler Technologies, Carrie Hughes, Senior Account Executive, Tyler Technologies, Everett Jefferson, Account Representative, Tyler Technologies.
WEDNESDAY, JUNE 14			
8:30 - 9:30	Bitterroot	ESSER Funding Sunset- What Now? Cost Savings Measures for facilities, construction, & capital budgeting.	McKinstry Representatives will discuss the cost savings opportunities available to schools in the areas of facilities operation, energy savings, construction, and capital purchasing. The basic principles of the Design-Build process and guaranteed maximum cost will be outlined to help business managers understand available cost savings measures in general operations budgets, building reserve budgets, and construction budgets. The session will also outline cost savings measures available for capital improvements through the Inflation Reduction Act and the Renewing America's Schools Act. Presented by Halvor Kamrud, Bob Moore, and Dayton Vaughn, McKinstry
8:30 - 9:30	Sapphire	Hazing & Harassment in Public Schools- MSPLIP	Presented by a Bea Kaleva, Kaleva Law Offices on behalf of MSPLIP
8:30 - 9:30	Ponderosa	NGTV: Next Gen Taxable Values	Remember when gas cost less than a buck a gallon? Or coins weren't just a hassle? Or you got money for recycling cans instead of having to pay for it? If so, you must be really OLD!! :) Another thing that is old is last year's taxable values. In this reappraisal year, come hear what changes you can expect when you get your TVs in August, brush up on how mills are calculated, and hear what the implications are. Presented by Mike Waterman, Executive Director of Business & Operations, Bozeman Schools
8:30 - 9:30	Room 103	C&C User Group	Meeting for users of C & C School Accounting Software. Presented by David Bardwell, C & C Accounting.
8:30 - 9:30	Room 107	Tyler Tech User Group	School ERP Pro (Infinite Visions) 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. Presented by Diana B. Betancourt, Client Relations Manager, Tyler Technologies, Carrie Hughes, Senior Account Executive, Tyler Technologies, Everett Jefferson, Account Representative, Tyler Technologies. (continued at 9:40 session)

8:30 - 9:30	Room 108	Let the Information Flow	Are you tired of drowning in a sea of paperwork and struggling to keep track of important information and making sure the right people know the important information within your school? Say goodbye to the chaos and embrace the transformative power of Flow Forms, the ultimate workflow program for all types of forms! Don't miss this opportunity to revolutionize your school's workflow and information sharing process-- making it a breeze for employee hiring, termination, resignation, change of status, extra duty pay, and even assists with volunteer engagement. Let's dive in together and discuss a streamlined, organized, and exciting future for your school! Presented by Lois Lopez, HR Assistant Belgrade School District; Carrie Fisher, Finance Director, Belgrade School District; Terry Bybee, Flow Forms; and Tate Mitchell, Flow Forms
8:30 - 9:30	Room 101	Basic Spreadsheet Tips and Tricks	Learn the basics of spreadsheets using Google Sheets. Follow along on your own laptop or just observe and learn. This 60-minute session will assume that you are relatively new to working with spreadsheets and create a foundation for expanding your knowledge. We will cover the following topics...Data types and number formats, Auto-fill shortcuts, Formulas and cell references, Conditional formatting, Basic charts and graphs. Presented by Adam Milligan, Milligan School Data <u>Space limited to first ten attendees.</u>
8:30 - 9:30	Boardroom	Certification Training	MASBO Certification Program overview and test preparation. Presented by the MASBO Certification Committee, Colleen Drury, Deb Anderson, Melissa Bartelt, Karsen Floerchinger, Jen Mettler, and Lacey Porrovecchio.
9:40 - 10:40	Bitterroot	Pupil Transportation Overview	An Overview of Transportation Requirements, Forms, Deadlines, and Budgeting. Presented by Donell Rosenthal, State Director of Pupil Transportation, Office of Public Instruction
9:40 - 11:50	Sapphire	OPI Legislative Update	This session provides a brief look at many of the bills that passed into law during the 68th legislative session that directly or indirectly affect school district funding and business offices. Some additional discussion may be included to explain necessary changes for schools and what to expect going forward. Presented by Barbara Quinn, CPA School Finance Manager, OPI and Paul Taylor, Budget Analyst, OPI
9:40 - 11:50	Ponderosa	OPI Title and Federal Programs	This session will review the major federal educational programs Titles I, II, III, IV, VB, and IX (McKinney-Vento), allowable expenditures, grant management, and cover some basics of Egrants. While this session is geared for new business managers, there will be something for everyone. Presented by Jack O'Connor, OPI
9:40 - 10:40	Room 103	Workers' Compensation payroll reporting rules and payroll audit prep	This is a great introductory level WC course for new business managers looking to strengthen their understanding of the Montana Workers' Compensation payroll reporting rules and ways to prepare for a WC payroll audit. Shawn Bubb has been working with school districts in the WC space since 2002 and will ensure all the class participants come out with veteran level understanding of the workers' compensation system! Shawn will also cover the more impactful WC changes that came out of the most recent legislative session that will impact your schools' operations. Presented by Shawn Bubb, CPCU, CIC, CPA, CSRM, MSGIA/MTSBA Director of Insurance Services.
9:40 - 10:40	Room 107	Tyler Tech User Group	School ERP Pro (Infinite Visions) 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. Presented by Diana B. Betancourt, Client Relations Manager, Tyler Technologies, Carrie Hughes, Senior Account Executive, Tyler Technologies, Everett Jefferson, Account Representative, Tyler Technologies.
9:40 - 10:40	Room 108	Secure Act 2.0 – Should you update your plan?	The amount of information on Secure Act 2.0 can be overwhelming! We're here to help simplify the changes and empower you to make decisions for your employees' plans. We will review the mandatory changes to your plan, as well as provide the information you need to make decisions about the optional provisions. Presented by Scott Florsheim, Northwest Area Manager, American Fidelity
9:40 - 10:40	Room 101	Basic Spreadsheet Tips and Tricks	Learn the basics of spreadsheets using Google Sheets. Follow along on your own laptop or just observe and learn. This 60-minute session will assume that you are relatively new to working with spreadsheets and create a foundation for expanding your knowledge. We will cover the following topics...Data types and number formats, Auto-fill shortcuts, Formulas and cell references, Conditional formatting, Basic charts and graphs. Presented by Adam Milligan, Milligan School Data <u>Space is limited to first 10 attendees.</u>
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10:50 - 11:50	Bitterroot	Pupil Transportation Overview	An Overview of Transportation Requirements, Forms, Deadlines, and Budgeting, Presented by Donell Rosenthal, State Director of Pupil Transportation, OPI
10:50 - 11:50	Room 103	Why is Healthcare so Expensive?	The U.S. healthcare system is highly complex, with separate rules, funding ,enrollment dates, and out-of-pocket costs for employer-based insurance, private insurance from healthcare.gov, Medicaid, and Medicare. We will dive into multiple topics on why the costs continue to increase. Presented by Fabian Deneault, Marketing and Field Services Representative, Western Montana, and Jarett Laden, Marketing and Service Representative, Eastern/North East Region, Montana Unified School Trust (MUST).
10:50 - 11:50	Room 107	Fun with FRAM-Infinite Campus User Group	A look into FRAM and how IC can make this a smooth process for districts to use, report, and claim those funds. Including the new OPI directives involving Medicaid eligibility. Presented by Tamara Blanchard, Certified Training & Support of Infinite Campus, School Services of Montana.
10:50 - 11:50	Room 108	Basic Navigation of the ERIC System-PERS	If you are new to reporting or just need a refresher this class will go over everything you need to know about reporting in the ERIC System. Presented by Terry Dalton, Education Specialist and Roberta Scow, Employer Support, PERS.
10:50 - 11:50	Room 101	None	Free space for collaboration.
10:50 - 11:50	Boardroom	Certification Training	MASBO Certification Program overview and test preparation. Presented by the MASBO Certification Committee, Colleen Drury, Deb Anderson, Melissa Bartelt, Karsen Floerchinger, Jen Mettler, and Lacey Porrovecchio.
3:00 - 4:00	Bitterroot	OPI-ESSA	Why are we required to do ESSA coding? Where does the information end up? Focus on how to get the expenditures coded correctly, including school codes. Focus on steps 7 and 9 of the TFS. This session will be a discussion and brainstorming format. Presented by Andrea Mahommadi, Business Analyst, OPI and Laci Novark, Budget Analyst, OPI.
3:00 - 4:00	Sapphire	Getting your Feet Wet With the Student Activities Fund	Join us for an informative and interactive session on student activities accounting, where we will delve into essential aspects of managing funds and fundraisers for student organizations. This workshop is designed for those responsible for overseeing student activity funds and fundraisers. During the workshop, we will explore various topics aimed at promoting effective financial practices and ensuring compliance for a smoother audit. We will cover common forms used in student activities accounting, discuss potential pitfalls and challenges, share best practices, and provide ideas for general oversight of student activity funds and fundraisers. Presented by: Carrie Fisher, Belgrade School District, TJ Harold-Marmon, Ronan School District, & Stacy Montgomery, Forsyth School District
3:00 - 4:00	Ponderosa	Reserves: Untangling the Web	What do the entire Christmas season, turn signals, TV remotes, and General Fund reserves have in common? We've managed to make them all much more complicated than they really need to be. We can't tackle that whole list in one workshop—heck, a turn signal workshop alone could take weeks—but 50 minutes is plenty of time to demystify reserves. Presented by Mike Waterman, Executive Director of Business & Operations, Bozeman Schools
3:00 - 4:00	Room 103	Improving School Facilities: Bond Financing and Election Process Overview	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 an experienced school business official who has recently worked through the bond election and bond issuance process and is currently in the construction phase. Presented by Bridget Ekstrom (D.A. Davidson & Co.), Dan Semmens (Dorsey & Whitney) and Lonnie Morin (Arlee School Districts)
3:00 - 4:00	Room 107	Security Awareness: How to help protect your district from cyber crime	In this session, you'll learn simple techniques you can use everyday to help protect your district from cyber crime. Presented by Jeff Patterson, K-12 Montana, Inc.
3:00 - 4:00	Room 108	Onboarding Tips for New Full-Time PERS Employees	This course covers what employers need to be aware of when they hire a full-time PERS employee. Presented by Tamara Blanchard, Certified Training & Support of Infinite Campus, School Services of Montana.
3:00 - 4:00	Room 101	None	free space for collaboration.
3:00 - 4:00	Boardroom	Certification Testing	Certification tests(s) will be administered to those who have made previous arrangements with Marie Roach.

THURSDAY, JUNE 15			
8:30 - 9:30	Bitterroot	HB203 and HB332 - A Closer Look	Let's soak up the details of HB203, Open Enrollment bill and HB332, Health Insurance Trust. Presented by Denise Williams, Kalispell Public Schools.
8:30 - 9:30	Sapphire	Intercap Loans	A low cost variable rate loan program available to Montana schools to finance various projects, buses, bus barns, vehicles and equipment. Autopay rate for this adjustment period is 1.50%. Presented by Lois Welsh, Senior Bond Program Officer, Montana Board of Investments.
8:30 - 9:30	Ponderosa	Understanding School District Records Management	Understanding School District Record Management is hard. Paige and team will provide an overview of the records retention required. Presented by Paige Trautwein, Ravalli County Clerk of District Court & LGRC Member.
8:30 - 9:30	Room 103	MTSUIP 101	Join Laren Carparelli and Lisa Gowen for an overview of the Montana Schools Unemployment Insurance Program (MTSUIP). We will share information regarding UI Rates, base wage employers, claims and required responses, filing quarterly reports and amendments and much more. Presented by Laren Carparelli and Lisa Gowen, Montana Schools Unemployment Insurance Program.
8:30 - 9:30	Room 107	K12 Panel user group - using K12Panel.com for budgeting and inventory control	Come learn how to use the web-based tool K12Panel.com to track your inventory (technology and non-technology inventory!), keep track of who has what by checking devices out to students and/or staff, and learn a bit about how to use the tool to craft your building budget. Presented by Jeff Patterson, K12 Montana, Inc.
8:30 - 9:30	Room 108	Importance of Benefits Education	Employee benefits are becoming increasingly popular as a way to attract and retain employees. Still, most employees are not receiving the education they need to properly understand and value the benefits being offered to them. This presentation aims to show how implementing effective benefits education is vital to the overall success of your benefits program, and overall employee wellbeing. IMPORTANT: There should be no changes made to any approved PowerPoint outside of customizing with contact information. If any changes are made, the presentation will no longer be in compliance. Presented by Brett Demuzio, Montana State Manager, American Fidelity
8:30 - 9:30	Room 101	Audit Round Table	Round Table- Audit prep tips and tricks facilitated by Gwyn Andersen and Betty Brumwell.
8:30 - 9:30	Boardroom	Special Education Cooperative Financing	This workshop will review funding of Special Education Cooperatives and ways they work together with school districts to provide support services for special education. Topics included will be uses of funds, maintenance of effort, cash flow/request of dollars, flowthrough dollars to member districts and the accounting of those dollars, where to find sources on OPI website, and other topics that are brought up in discussion group at the end of presentation. Two hour session. Presented by Roger Heimbigner, Yellowstone W Carbon-Co Coop
9:40 - 10:40	Bitterroot	OPI-ESSA	Why are we required to do ESSA coding? Where does the information end up? Focus on how to get the expenditures coded correctly, including school codes. Focus on steps 7 and 9 of the TFS. This session will be a discussion and brainstorming format. Presented by Andrea Mohammadi, Business Analyst, OPI and Laci Novark, Budget Analyst, OPI.
9:40 - 10:40	Sapphire	TEAMS Transition – When One Pool Closes, Another Pool Opens!	Join me as we take an introductory dive into the TEAMS transition into Infinite Campus. Avoid the crowds and take a relaxing dip into the changes that will take place next year. You will learn about the transition, what OPI is doing to help, and how you can prepare for next school year. We'll talk about school calendars, Terms of Employment, QEC, Teacher Incentive and Teacher-Class data. It will be a busy session, but we'll make sure there are plenty of lifeguards!! Presented by Nicole Thuotte, AIM Unit Manager, Montana Office of Public Instruction
9:40 - 10:40	Ponderosa	Accessible, Transparent, and Efficient: Utilizing the new MTSBA/Simbli Platform	This session will provide attendees with best practices to maximize their district's use of the MTSBA District Policy hosting platform established in partnership with Simbli. The new policy hosting platform addresses necessary needs for school districts and their community stakeholders which include making policies searchable, integrated and ADA compliant on any device; streamlined editing and printing options; and hosted on a customized website to match the format of the district's current website. Learn more about the final stages of the conversion process and functionality options with this exciting new platform. In addition, learn from a school district who has embraced Simbli's Meetings platform to transform board meetings by making them more efficient and paperless. Learn how policies easily integrate into board meetings when the two platforms are used together. Policies, meeting agendas, board packet information, and minutes-- all in one place! Presented by Kris Goss, MTSBA and Carrie Fisher, Belgrade Public Schools.

9:40 - 10:40	Room 103	Black Mountain Software Did You Know	A quick trip through our applications, reminding users of all BMS offers. Presented by Lindsey Taylor, Black Mountain Software.
9:40 - 10:40	Room 107	Budgeting for Technology: why your tech levy is NOT your tech budget	Many districts ask: what's the right amount to budget for technology? How much of a tech levy do I need? How can I avoid the feast-or-famine buy cycles of Chromebooks? Come learn how to proactively budget for technology spending, and how to help your district break the mindset that the technology levy is the technology budget. Presented by Jeff Patterson, K12 Montana, Inc.
9:40 - 10:40	Room 108	OPI- GASB Guidance And Audits	Overview of new GASB guidance that affects schools and a refresher of guidance on Leases. Additionally an audit update for schools will be provided as well as an overview of the OPI Audit website. Presented by Kristen Becker, Auditor, OPI and Autun Belmont, Budget Analyst, OPI.
9:40 - 10:40	Room 101	SBO Reference Guide Round Table	Round Table - Bring your cheat sheets, ideas and and questions- Gwyn Andersen and Betty Brumwell are tackling the impressive project of creating a Montana SBO reference manual and we want to hear your thoughts, suggestions, and needs.
9:40 - 10:40	Boardroom	Special Education Cooperative Financing	Continued from prior hour. This workshop will review funding of Special Education Cooperatives and ways they work together with school districts to provide support services for special education. Topics included will be uses of funds, maintenance of effort, cash flow/request of dollars, flowthrough dollars to member districts and the accounting of those dollars, where to find sources on OPI website, and other topics that are brought up in discussion group at the end of presentation. Presented by Roger Heimbigner, Yellowstone W Carbon-Co Coop
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11:00 - 12:00	Ponderosa	Soak It Up or Suck It Up With MSGIA	Join the MSGIA Risk Managers as they walk you through finding some crucial information from their website, the Safe Schools program changes, and the new School Educational Initiative. With a few easy steps your district can be eligible for new safety equipment! We haven't decided whether you should bring a straw or bring lotion, but we hope you bring yourself to this informative training. Presented by the MSGIA Team.
11:00 - 12:00	Room 103	Medicaid Reimbursements for IEP Based Services	Get your questions answered about Medicaid reimbursements for students with eligible direct care services. Learn what other services qualify and gain tips about submitting claims to DPHHS. Presented by Lisa Waterman, Medicaid Billing Program Specialist, School Services of Montana.
11:00 - 12:00	Room 107	OPI Impact Aid	Impact Aid Application tips (finding federally connected students, special education count requirements, tuition in/out and how HB203 affects the count), Dept. of Education website tools, legislative updates. Presented by Lonnie Morin, Arlee Public Schools and Nicole Thuotte and Laci Novark, OPI.
11:00 - 12:00	Room 108	OPI GASB Guidance And Audits	Overview of new GASB guidance that affects schools and a refresher of guidance on Leases. Additionally an audit update for schools will be provided as well as an overview of the OPI Audit website. Presented by Kristen Becker, Auditor, OPI and Autun Belmont, Budget Analyst, OPI.
11:00 - 12:00	Room 101	None	free space for collaboration
11:00 - 12:00	Boardroom	Legislative Wrap-up Q&A with Paul Taylor, OPI	Round Table- Chat with Paul Taylor about legislative questions you may have for your district. <u>Space is limited to 10 people.</u>

1:40 - 2:40	Bitterroot	OPI General Fund Budgets	Spend an hour of your life relaxing with the lovely general fund budget spreadsheet. Immerse yourself in the soothing thought of complicated mathematical formulas that continue to never be simplified so that all people are easily able to decipher without any stressful feelings in the least. Yes, the spreadsheet that 20-9-311, 20-9-206, 20-9-208, 15-10-435, 20-9-525 built. Bring your problems and voice your concerns as we float around on a cloud of effervescent freeform discussion (humor intended). Feel free to bring your laptop and work with the spreadsheet in real time along with the discussion. Presented by Paul Taylor, Budget Analyst, OPI, and Autumn Belmont, Budget Analyst, OPI
1:40 - 2:40	Sapphire	Tuition Fund Review – Focusing on what will NOT change with the passage of HB 203.	Discussion Topics include, the basics of tuition funds, the difference between discretionary and mandatory tuition, who pays tuition, tuition forms, tuition rates for FY24, how to enter into MAEFAIRS, and accounting for tuition. Presented by Andrea Mohammadi, Business Analyst, OPI, and Barbara Quinn, Senior Finance Manager, OPI.
1:40 - 2:40	Ponderosa	Completing the Trustees Financial Summary	We will go over the process of inputting the Trustees Financial Summary into Maefairs and how it flows into the Budget. Presented by Laci Norvark, Budget Analyst, OPI. and Kristen Becker, Auditor, OPI.
1:40 - 2:40	Room 103	Wellness in the Workplace	Why should employers care about investment in wellness programs? Boosted moral, decrease in workplace absenteeism, healthier employees– these are just a few of the benefits that will help your company thrive from the inside and out, every day. Presented by Jim Mephram, Marketing and Sales Representative, North Central Montana, and Deanna Anderson, Marketing and Services Representative, South Central Montana, Montana Unified School Trust, (MUST).
1:40 - 2:40	Room 107	TRS for Business Managers	An overview of the TRS wage and contributions reporting requirements and the TRS reporting system. This session is great for new Business Managers and Clerks, but also has several reminders and tips for experienced professionals. Presented by Darla Fitzpatrick, Communication Manager, MT Teachers' Retirement System and Nolan Brilz, Accounting/Fiscal Manager, MT Teachers' Retirement System
1:40 - 2:40	Room 108	School Nutrition Basics and Updates for FY 2023-24	Get ready for the 2023-24 school year with School Nutrition Programs basics for business officials and clerks. Review annual program requirements and due dates. Learn about new program changes. We'll discuss many topics and leave time for questions. This session will repeat, so all who are interested can attend. Presented by Rochelle Davies, RDN, LN, SNS, Specialist, School Nutrition Programs, OPI and Allie Wolf, Business Analyst, School Nutrition Programs, OPI
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3:00 - 4:00	Room 103	Building a Resilient Shield: Cybersecurity Risk Management Strategies for Public School Districts-MSPLIP	Cyber-attacks are increasing and targeting Public School Districts. Today's attack surface requires a proactive approach, focusing on preventative risk mitigation strategies that give more visibility, more context and a better mechanism to tie technical risk to business context. This session will provide attendees with Cybersecurity Best Practices to reduce cyber risk while enhancing your cyber resilience. You'll learn how a Cyber Action Plan and Strategy align Executive Governance with Administrative and Technical activities to properly manage cyber risk. Hear horror stories of cyberattacks and the sophistication of today's Cyber Criminals; the importance of an Incident Response Plan to recover from a cyber-attack; and why Cybersecurity is a Process as you mature your cyber posture over time. Presented by Jeff Schobel, Co-founder and Chief Executive Officer of ResoluteGuard
3:00 - 4:00	Room 107	MONEY, MONEY, MONEY: Infinite Campus and OPI	How IC will streamline your State Reporting to ensure that you receive maximum funding. Included: The new OPI shift in retiring the TEAMS and TOE systems and moving them into AIM with direct IC reporting. Presented by Tamara Blanchard, Certified Training & Support of Infinite Campus, School Services of Montana.
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FRIDAY, JUNE 16			
8:30 - 10:30	Bitterroot Sapphire Ponderosa	MTSBA School Law Update	An update on the latest issues in School Law, plus a Q&A about Student Records. Presented by Debra Silk, Montana School Boards Association.