

2024 MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS - COURSE DESCRIPTIONS

Time	Room	Topic	Description
MONDAY, JUNE 10			
8:00 - 5:00	Yellowstone	Money \$\$\$ Monday OPI AIM/ Infinite Campus Training	This session is hosted by both your local AIM superstar, Nicole Thuotte, and her favorite Campus Minion, Mary Anne Skinner! We'll spend the day with Business Managers, District Clerks, and Admin wanting to know more about TEAMs, TOE, and EOY Reporting. Each part of the day will have workshop time so you can work directly with the experts. Get your District lined out to streamline your State reporting and maximize your money! <i>Presented by Nicole Thuotte, AIM Unit Manager, OPI and Marry Anne Skinner, Director of Infinite Campus Support Services, School Services of Montana.</i>
8:00 - 5:00	Missouri	New SBO Academy	Welcome/Introductions: Records Retention, Fixed Assets & Depreciation Schedules, Fish Bowl Q&A, Mock Board Meeting, and Preparation for the TFS. <i>Presented by Donnie McVee and Shay Baize, MASBO, with special guests!</i>
TUESDAY, JUNE 11			
9:00 - 4:00	Ballroom	Tyler Technologies School ERP Pro User Group Meeting	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. <i>Presented by Diana Betancourt, Client Relations Manager, Tyler Technologies, Inc.</i>
9:00 - 5:00	Yellowstone	OPI AIM Available for Q&A	Come by the room and get assistance with AIM entries, etc. No appointment necessary, come by and say hi.
9:00 - 5:00	Missouri	Black Mountain Software User Group Meeting	A fun interactive day that will allow you to build connections with your peers while learning more about BMS! <i>Presented by RaLynn Brown and Trinette Todd, Black Mountain Software.</i>
9:00 - 4:00	Parlor 1010	C&C School Accounting Software User Group Meeting	Meeting for users of C & C School Accounting Software. <i>Presented by David Bardwell, C & C Accounting.</i>
WEDNESDAY, JUNE 12			
8:00 - 11:00	Parlor 1030	Stress Relief- Spend some time with rescued dogs & puppies seeking forever homes	Spend a little time recharging your batteries by cuddling and playing with some fabulous furry friends seeking new loving homes. You are welcome to spend any amount of time with these amazing pets. Rez Dog Rescue of Montana is a volunteer based 501(c)3 rescuing stray and unwanted dogs from South Central Indian Reservations in Montana. Because we don't have a physical location, all our dogs are housed in foster homes around the Billings area. All our dogs are vetted, vaccinated, and spayed or neutered before they are put up for adoption. We strive to find all our dogs loving forever homes.
8:30 - 9:30	Ballroom	OPI Medley	<i>(1st hour of a 2 hr session)</i> In this presentation we will be presenting on a variety of topics including budget amendments, Indian Education for All, Reserves, Program Codes, and more. <i>Presented by the Office of Public Instruction (OPI) Finance Team.</i>

8:30 - 9:30	Yellowstone	Tyler User - School ERP Pro User Group Meeting	(1st hour of a 2 hr session) 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 Betancourt, Client Relations Manager, Tyler Technologies, Inc.
8:30 - 9:30	Missouri	Wonder Wednesday, OPI AIM/Infinite Campus	Ever wonder how life could be made easier for State Reporting? Couldn't attend Monday? Join us for a 3 hour session on everything you may need to know about TEAMS, TOE, EOY Attendance, State Reporting, CNP, and MORE! Tips and tricks for all who join us. Presented by Nicole Thuotte, AIM Unit Manager, OPI and Marry Anne Skinner, Director of Infinite Campus Support Services, School Services of Montana.
8:30 - 9:30	Parlor 1010	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 Nolan Brilz, Accounting/Fiscal Manager, Montana Teachers' Retirement System (TRS).
8:30 - 9:30	Parlor 1009	"Let's Talk About Stress" Reducing Employee Stress & Burnout	Learn about stress and workplace burnout and why it is one of the most important issues to address at your school. This integrative presentation will provide real life techniques to reduce your stress and learn skills to prevent your own workplace burnout. Presented by Katie Ball, Licensed Clinical Therapist, Stress Coach, and Speaker.
8:30 - 9:30	Parlor 1001	Rody's Top Ten! MSPLIP	Rody Holman will share enlightening stories fo interesting claims administered by the insurance program over the past 25 years. Examples will provide you with information about what <i>not</i> to do in your schools. Presented by Rody Holman, Montana Schools Property & Liability Insurance Plan.
8:30 - 9:30	Parlor 1018	Bid Law and Purchasing with Montana Cooperative Services	This clinic session will feature a comprehensive review of state bidding standards and processes. Details on the flexibility that Montana Law provides for the cooperative bidding process will be included. Be prepared well in advance and save yourself some time and your district some dollars. Presented by Larry Crowder, Executive Director of Montana Rural Education Association and Montana Cooperative Services; and Rich Batterman, Batterman Law PC and Chief Legal Council for MREA and MCS.
8:30 - 9:30	Parlor 1019	Changing the Dynamics of School Transportation, It Starts With YOU!	Perhaps you have haven't noticed, but parenting responsibilities have changed over the past few decades. The migration of responsibilities and expectations has resulted in Transportation Specialists being required to not only transport students from home to school and back, but we have also been tasked with making these trips as counselors, behavior specialists, medical providers, and safety officers. These changes can be positive by opening our minds and putting aside the belief that this is just the way it has always been done. We should look to new and innovative ways to positively change our industry. We need to learn how to collaborate with our special needs departments, parents, and district administrations about new best practices and meeting the needs of students and our bus support team. Presented by Zada Stamper, Transportation Director, Laurel Public Schools.
8:30 - 9:30	Parlor 1031	A Paperless Business Office: The Impossible Dream	Some say it is a myth. Is it even possible to have a paperless business office? We'll answer that by collaboratively building a Better Purchase Request in less than one hour. Presented by Terry Bybee, co-founder of Flow Forms, a Montana software company.
8:30 - 9:30	Board Room	Spreadsheets Tips and Tricks 1: An introduction to spreadsheets.	(Limited to 12 attendees. Priority will be given in order of arrival) An introduction to spreadsheets. How to navigate and enter data. Working with different data types. Simple formulas and functions. No prior knowledge needed! Presented by Adam Milligan: Owner - Milligan School Data

9:40 - 10:40	Ballroom	OPI Medley	(2nd hour of a 2 hr session) In this presentation we will be presenting on a variety of topics including budget amendments, Indian Education for All, Reserves, Program Codes, and more. Presented by the Office of Public Instruction (OPI) Finance Team.
9:40 - 10:40	Yellowstone	Tyler User - School ERP Pro User Group Meeting	(2nd hour of a 2 hr session) 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 Betancourt, Client Relations Manager, Tyler Technologies, Inc.
9:40 - 10:40	Missouri	Wonder Wednesday, OPI AIM/Infinite Campus	(2nd hour of a 3 hr session) Ever wonder how life could be made easier for State Reporting? Couldn't attend Monday? Join us for a 3 hour session on everything you may need to know about TEAMS, TOE, EOY Attendance, State Reporting, CNP, and MORE! Tips and tricks for all who join us. Presented by Nicole Thuotte, AIM Unit Manager, OPI and Marry Anne Skinner, Director of Infinite Campus Support Services, School Services of Montana.
9:40 - 10:40	Parlor 1010	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 Nolan Brilz, Accounting/Fiscal Manager, Montana Teachers' Retirement System (TRS).
9:40 - 10:40	Parlor 1009	"Let's Talk About Stress" Reducing Employee Stress & Burnout	Learn about stress and workplace burnout and why it is one of the most important issues to address at your school. This integrative presentation will provide real life techniques to reduce your stress and learn skills to prevent your own workplace burnout. Presented by Katie Ball, Licensed Clinical Therapist, Stress Coach, and Speaker.
9:40 - 10:40	Parlor 1001	Jeopardy! Criminal Records Edition	"I'll take Criminal Records & Identification Services Section for 1200 please, Alex!" In this session we will review the process, procedures and required documentation necessary to submit federal fingerprint-based background checks through the state of Montana. Presented by Mernie McCarl, Criminal Records & Identification Services Section, Montana Department of Justice.
9:40 - 10:40	Parlor 1018	Bid Law and Purchasing with Montana Cooperative Services	This clinic session will feature a comprehensive review of state bidding standards and processes. Details on the flexibility that Montana Law provides for the cooperative bidding process will be included. Be prepared well in advance and save yourself some time and your district some dollars. Presented by Larry Crowder, Executive Director of Montana Rural Education Association and Montana Cooperative Services; and Rich Batterman, Batterman Law PC and Chief Legal Council for MREA and MCS.
9:40 - 10:40	Parlor 1019	Changing the Dynamics of School Transportation, It Starts With YOU!	Perhaps you have haven't noticed, but parenting responsibilities have changed over the past few decades. The migration of responsibilities and expectations has resulted in Transportation Specialists being required to not only transport students from home to school and back, but we have also been tasked with making these trips as counselors, behavior specialists, medical providers, and safety officers. These changes can be positive by opening our minds and putting aside the belief that this is just the way it has always been done. We should look to new and innovative ways to positively change our industry. We need to learn how to collaborate with our special needs departments, parents, and district administrations about new best practices and meeting the needs of students and our bus support team. Presented by Zada Stamper, Transportation Director, Laurel Public Schools.

9:40 - 10:40	Parlor 1031	ESSER Final Closeout and Summer Use of Funds	Participants will gain a walk through of how ESSER closeout will occur including Final Expenditure Reports, ESSER I-III Budget Page Descriptions, Review of Data Collection Reported Data, and Resources to help with closeout. Participants will also gain information on how remaining ESSER funds might be applied to summer months using partnerships with non-school agencies. Extended Expanded Learning Opportunity grant and braiding resources will be covered in this presentation. Presented by Allison Agostino, Project Communications Specialist, ESSER, Office of Public Instruction.
9:40 - 10:40	Board Room	Special Education Cooperative Group Meeting	(1st hour of a 2 hr session) 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. Up to a two hour session. Presented by Roger Heimbigner, Yellowstone W Carbon-Co Coop.
10:50 - 11:50	Ballroom	OPI Tuition and HB 203	Overview of the tuition process and HB203 from the 2023 legislative session. Presented by Barbara Quinn, School Finance Senior Manager and Andrea Mohammadi, Business Analyst, Office of Public Instruction.
10:50 - 11:50	Yellowstone	Cleaning Out That Old Filing Cabinet in the Closet – Montana’s Record Retention Laws	Getting ready to fire up that paper shredder? Whoa! As your district’s clerk, you are the custodian of all the district’s documents, records, and reports. You are also obligated to manage those records in an “orderly and systematic way,” including retaining minutes, complaints, deeds, incoming and outgoing emails, and a ton of other stuff according to specific schedules!What are your obligations for record retention? What resources are out there to help? Presented by Jeff Weldon and Nyles Greer, Felt Martin PC.
10:50 - 11:50	Missouri	Wonder Wednesday, OPI AIM/Infinite Campus	(3rd hour of a 3 hr session) Ever wonder how life could be made easier for State Reporting? Couldn’t attend Monday? Join us for a 3 hour session on everything you may need to know about TEAMs, TOE, EOY Attendance, State Reporting, CNP, and MORE! Tips and tricks for all who join us. Presented by Nicole Thuotte, AIM Unit Manager, OPI and Marry Anne Skinner, Director of Infinite Campus Support Services, School Services of Montana.
10:50 - 11:50	Parlor 1010	ASBO Live – Jeopardy Game Show	Participants will join a Jeopardy team and will be challenged with Montana Fun Facts, Financial Recognition, ASBO Events, Award Programs, Online Engagement, and Advocacy. Participants will be competing for ASBO Bucks. Presented by Jim Rowan, CEO/Executive Director, ASBO International.
10:50 - 11:50	Parlor 1009	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. Presented by John Doran, Chief Strategy Officer, Montana School Insurance Alliance.
10:50 - 11:50	Parlor 1001	Jeopardy! Criminal Records Edition	“I’ll take Criminal Records & Identification Services Section for 1200 please, Alex!” In this session we will review the process, procedures and required documentation necessary to submit federal fingerprint-based background checks through the state of Montana. Presented by Mernie McCarl, Criminal Records & Identification Services Section, Montana Department of Justice.
10:50 - 11:50	Parlor 1018	Wipfli- Audit Preparation	Discussion will include: What an audit is? How to prepare for an audit and what to expect. What information will the auditor will ask for? What final product will be and your responsibilities- Type of audit opinions and if there are any findings how severe they are? Presented by Tony Gerharz, CPA Senior Manager, Audit, Wipfli LLP.

10:50 - 11:50	Parlor 1019	Transportation Issues That Can and DO Affect School Districts	Several laws affect school transportation, including state and/or federal laws (Hours of Service, Drug & Alcohol Clearinghouse, MAP21, including the new ELDT, Driver Training requirements, and Use of NON-approved buses/vehicles for home-to-school or school-to-home routes). It's up to the schools to ensure that they are following the laws correctly. If they aren't, they can lose state reimbursement from OPI and could be subject to state or federal fines (both for the school district and the driver). Presented by Michael Edwards, Harlow's School Bus Services, Stevensville Transportation Manager, Stevensville Public Schools.
10:50 - 11:50	Parlor 1031	Mastering the Facility Finance Game: School Renovations, Capital Projects & Equipment Replacement, & Energy Performance Funding	Representatives from McKinstry will discuss Design - Build procurement and energy performance contract methods for school construction, renovation projects and affordable staff house construction. The session will begin with the legal basis for alternative procurement from Montana Codes 18-2-501 through 18-2-503 and progress through engagement of Design-Build teams to evaluate and plan for bond/reserve elections by bundling construction, architecture, and engineering services. The session will also provide an overview of our capital planning and maintenance assessments being used by several schools throughout Montana. This assessment provides an accurate equipment listing, helps districts extend the life of equipment, and provides proactive information for capital equipment budgeting. Our assessment coupled with our Reveal software is a tool for yearly capital budget planning and much more. Presented by Bob Moore, Account Executive McKinstry Co., LLC.
10:50 - 11:50	Board Room	Special Education Cooperative Group Meeting	(2nd hour of a 2 hr session) 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.
3:00 - 4:00	Ballroom	Who Wants to be a Millionaire? Nicole & Paul, OPI	Well, we can't promise you a million, but Paul Taylor and Nicole Thuotte will show you how to maximize your budget through accurate data reporting. Learn about state funding sources, how data flows between data systems, and the secrets to accurate data entry. We're throwing you a lifeline so you can be confident when asked, "Is that your final answer?" Presented by Nicole Thuotte, AIM Unit Manager, OPI; and Paul Taylor, Lead Budget Analyst School Finance Division, OPI.
3:00 - 4:00	Yellowstone	Cleaning Out That Old Filing Cabinet in the Closet – Montana's Record Retention Laws	Getting ready to fire up that paper shredder? Whoa! As your district's clerk, you are the custodian of all the district's documents, records, and reports. You are also obligated to manage those records in an "orderly and systematic way," including retaining minutes, complaints, deeds, incoming and outgoing emails, and a ton of other stuff according to specific schedules!What are your obligations for record retention? What resources are out there to help? Presented by Jeff Weldon and Nyles Greer, Felt Martin PC.
3:00 - 4:00	Missouri	Board Meetings, Notices, and Minutes with Kaleva Law	Legal requirements for board meeting records, notices and other documents have increased, and the Board Clerk is responsible to maintain all of these crucial documents. Come learn about new laws impacting minutes, notices and meetings, and the best practices for Clerks to keep their Boards in compliance. Presented by Elizabeth Kaleva, PC, Kaleva Law Offices.
3:00 - 4:00	Parlor 1010	Advocacy Tips & Tools to Engage at the State & Federal Level	Participants will learn some key advocacy tips and tools that will allow them to engage with their legislators at the State and Federal levels. Presented by Jim Rowan, CEO/Executive Director, ASBO International.

3:00 - 4:00	Parlor 1009	Let's Start at the Very Beginning- MSGIA Worker's Compensation	Every professional and gold medalist started as a beginner. Come join the MSGIA crew as we take you from the starting line to the finish line with WC 101. Whether you are a beginner or already at the top of the podium, we promise there will be something for everyone. Presented by Shawn Bubb, MTSBA Director of Insurance Services; Brenda Koch, Risk Management Associate; and Annette Satterly, MS, CRM, CIC, CSRM, CPSI Risk Management Associate. Montana School Insurance Group (MSGIA).
3:00 - 4:00	Parlor 1001	Medicaid Reimbursements for IEP Based Services provided in Montana Schools	Come learn about Medicaid reimbursements for students with eligible direct care services. We will cover what services qualify and cover steps for submitting claims to DPHHS. Bring your questions and prepare to learn something new! Presented by Lisa Waterman, Medicaid Billing Program Manager, School Services of Montana.
3:00 - 4:00	Parlor 1018	Improving School Facilities: Overview of the Capital Planning, Bond Election and Bond Financing Process	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 capital planning, bond election and bond issuance process and is currently in the construction phase. Presented by Julie Jones (Laurel School Districts), Bridget Ekstrom and Crystal Vogl (D.A. Davidson & Co.), Dan Semmens and Courtney Ellis (Dorsey & Whitney).
3:00 - 4:00	Parlor 1019	Transportation Issues that Can and DO Affect School Districts	Several laws affect school transportation, including state and/or federal laws (Hours of Service, Drug & Alcohol Clearinghouse, MAP21, including the new ELDT, Driver Training requirements, and Use of NON-approved buses/vehicles for home-to-school or school-to-home routes). It's up to the schools to ensure that they are following the laws correctly. If they aren't, they can lose state reimbursement from OPI and could be subject to state or federal fines (both for the school district and the driver). Presented by Michael Edwards, Harlow's School Bus Services, Stevensville Transportation Manager, Stevensville Public Schools.
3:00 - 4:00	Parlor 1031	ESSER Final Closeout and Summer Use of Funds	Participants will gain a walk through of how ESSER closeout will occur including Final Expenditure Reports, ESSER I-III Budget Page Descriptions, Review of Data Collection Reported Data, and Resources to help with closeout. Participants will also gain information on how remaining ESSER funds might be applied to summer months using partnerships with non-school agencies. Extended Expanded Learning Opportunity grant and braiding resources will be covered in this presentation. Presented by Allison Agostino, Project Communications Specialist, ESSER, Office of Public Instruction.
3:00 - 4:00	Board Room	MASBO School Business Official State Certification Test 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.
THURSDAY, JUNE 13			
8:00 - 11:00	Parlor 1030	Stress Relief- Spend some time with rescued dogs & puppies seeking forever homes	Spend a little time recharging your batteries by cuddling and playing with some fabulous furry friends seeking new loving homes. You are welcome to spend any amount of time with these amazing pets. Rez Dog Rescue of Montana is a volunteer based 501(c)3 rescuing stray and unwanted dogs from South Central Indian Reservations in Montana. Because we don't have a physical location, all our dogs are housed in foster homes around the Billings area. All our dogs are vetted, vaccinated, and spayed or neutered before they are put up for adoption. We strive to find all our dogs loving forever homes.

8:30 - 9:30	Ballroom	Pop Quiz with Mike Waterman and Denise Williams	Join us for some friendly competition as we rack your brains with school finance questions. Win or lose, everyone is sure to learn something and have fun doing it. Presented by Mike Waterman, Bozeman Public Schools and Denise Williams, Missoula Public Schools.
8:30 - 9:30	Yellowstone	Board Meetings, Notices, and Minutes with Kaleva Law	Legal requirements for board meeting records, notices and other documents have increased, and the Board Clerk is responsible to maintain all of these crucial documents. Come learn about new laws impacting minutes, notices and meetings, and the best practices for Clerks to keep their Boards in compliance. Presented by Elizabeth Kaleva, PC, Kaleva Law Offices.
8:30 - 9:30	Missouri	OPI Medley	(1st hour of a 2hr session) In this presentation we will be presenting on a variety of topics including budget amendments, Indian Education for All, Reserves, Program Codes, and more. Presented by the Office of Public Instruction (OPI) Finance Team.
8:30 - 9:30	Parlor 1010	"Let's Talk About Stress" Reducing Employee Stress & Burnout	Learn about stress and workplace burnout and why it is one of the most important issues to address at your school. This integrative presentation will provide real life techniques to reduce your stress and learn skills to prevent your own workplace burnout. Presented by Katie Ball, Licensed Clinical Therapist, Stress Coach, and Speaker.
8:30 - 9:30	Parlor 1009	Being a Smart Shopper – The U.S. Healthcare System presented by MUST	The U.S. Healthcare system is highly complex and costly. We will provide you with information regarding the importance of preventative services. The advantages of preventative health vs. reactive health, and information pertaining to preventative pharmacy benefits. We will also dive into multiple topics to help you spread out your healthcare dollar. Presented by DeAnna Milmine, Marketing & Sales Representative, Region 2; Jarrett Laden, Marketing & Sales Representative, Region 3; and Jim Mephram, Marketing & Sales Representative, Region 4, Montana Unified School Trust (MUST).
8:30 - 9:30	Parlor 1001	Wage and Hour Law	This workshop is comprised of general information to provide insight and clarification regarding Wage and Hour laws and their application to school districts. Presented by Karla Ivie, Compliance Specialist, Employment Standards Division, Montana Department of Labor.
8:30 - 9:30	Parlor 1018	Impact Aid Applications and Tips	Impact Aid Applications and tips (finding federally connected students, special education count requirements, how to read a coucher). Dept. of Education website tools, legislative updates. Presented by Lonnie Morin, Arlee Public Schools and IISM Executive Director
8:30 - 9:30	Parlor 1019	Clean School Bus and Clean Heavy Duty Vehicles Programs	The presentation from the EPA highlights funding opportunities for school districts. These opportunities provide funding for school districts to replace their old buses with low and zero-emission school buses. Low and zero-emission school buses is one of EPA's objectives to protect the developing lungs of children. The presentation gives an overview of the current funding opportunities and how to apply to them. Presented by Volpe Voe, Environmental Engineer, and YeChan Lim, Technical Lead, U.S. EPA Region 8, Air Permitting and Grants Management Branch
8:30 - 9:30	Parlor 1031	Banking Outside of the County	The session will cover banking considerations, paperwork to file to move your funds, monthly reconciling, investments, and FDIC coverage. Presented by TJ Marmon, Ronan Public Schools and Denise Mason, East Glacier Park Public Schools.
8:30 - 9:30	Board Room	Spreadsheet Tips & Tricks 2: Intermediate/Advanced	The first class covered how to navigate and enter data, different data types, and simple formulas and functions. Picking up where the first class left off we will cover more advanced functions. Sorting. Graphs. Conditional formatting. Presented by Adam Milligan: Owner - Milligan School Data.

9:40 - 10:40	Ballroom	Black Mountain Software User Group	A quick trip through our applications, reminding users of all BMS offers. Presented by RaLynn Brown, Black Mountain Software.
9:40 - 10:40	Yellowstone	Presenting Budgets to Trustees	School finance is a massive subject and takes most of us a few years to get a handle on, right? And, public speaking is people's biggest fear! Mix these together and you get a significant portion of our duties! We are going to discuss ways to help our volunteer school board members feel comfortable with adopting the budgets and help you master your game. This is geared more for New Clerks, but if you're an old pro, come and share your wisdom. Presented by Lacey Porrovecchio, School Business Official, Bigfork Public Schools and MASBO Board Member.
9:40 - 10:40	Missouri	OPI Medley	(2nd hour of a 2hr session) In this presentation we will be presenting on a variety of topics including budget amendments, Indian Education for All, Reserves, Program Codes, and more. Presented by the Office of Public Instruction (OPI) Finance Team.
9:40 - 10:40	Parlor 1010	Mitigating Burnout	This collaborative and engaging session will discuss burnout in the k-12 landscape. Recognizing the types of emotional impacts at work, How Mental Health Impacts Employees and Student Achievement, What tools can we put in place to address and mitigate burnout? Presented by Thomas Reynolds, MS SHRM-CP, Human Resources Director, Title IX Coordinator, Belgrade School District #44.
9:40 - 10:40	Parlor 1009	The Thrill of Victory and the Agony of Defeat-MSGIA	We all want the thrill of victory. Unfortunately, many coaches and physical education teachers in our public schools are experiencing the agony of defeat. Join the MSGIA crew as they discuss the ever-increasing frequency and severity of coach and gym teacher injuries and ideas on preventing them. Presented by Shawn Bubb, MTSBA Director of Insurance Services; Brenda Koch, Risk Management Associate; and Annette Satterly, MS, CRM, CIC, CSRM, CPSI Risk Management Associate. Montana School Insurance Group (MSGIA)
9:40 - 10:40	Parlor 1001	Wipfli- Audit Preparation	Discussion will include: What an audit is? How to prepare for an audit and what to expect. What information will the auditor will ask for? What final product will be and your responsibilities- Type of audit opinions and if there are any findings how severe they are? Presented by Tony Gerharz, CPA Senior Manager, Audit, Wipfli LLP.
9:40 - 10:40	Parlor 1018	C&C School Accounting Software User Group	Meeting for users of C & C School Accounting Software. Presented by David Bardwell, C & C Accounting.
9:40 - 10:40	Parlor 1019	Clean School Bus and Clean Heavy Duty Vehicles Programs	The presentation from the EPA highlights funding opportunities for school districts. These opportunities provide funding for school districts to replace their old buses with low and zero-emission school buses. Low and zero-emission school buses is one of EPA's objectives to protect the developing lungs of children. The presentation gives an overview of the current funding opportunities and how to apply to them. Presented by Volpe Voe, Environmental Engineer, and YeChan Lim, Technical Lead, U.S. EPA Region 8, Air Permitting and Grants Management Branch
9:40 - 10:40	Parlor 1031	Winning Strategies When Using E-Grants	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. Presented by Mindi Askelson, ESSER/E-Grants IT Systems Analyst and Dan McNurlin, E- Grants IT Systems Analyst.

9:40 - 10:40	Board Room	No Session	No Session
11:00 - 12:00	Ballroom	Pop Quiz with Mike Waterman and Denise Williams	Join us for some friendly competition as we rack your brains with school finance questions. Win or lose, everyone is sure to learn something and have fun doing it. Presented by Mike Waterman, Bozeman Public Schools and Denise Williams, Missoula Public Schools.
11:00 - 12:00	Yellowstone	Master Student Activity Funds	Ready to ace next year's student activity funds? Curious about which funds go into the Student Activity Account? Want insider tips on best practices for internal controls? Join the Student Activities Committee for a dynamic session that will help you navigate the course without hitting any sand traps or water hazards! Presented by Carrie Fisher, Belgrade School District; TJ Marmon, Ronan School District; and Stacy Montgomery, Forsythe School District.
11:00 - 12:00	Missouri	OPI Teach Act	We will be presenting on the Teach Act (Teacher Incentive Program). How to know if your school and your teachers qualify, how to enter your teachers into Infinite Campus, what to expect from the OPI during the verification process, and how to remove your disqualified teachers from participating. We will have time for questions from schools at the end and are more than happy to try to answer all questions. Presented by the Office of Public Instruction (OPI) Finance Team.
11:00 - 12:00	Parlor 1010	Technology budgeting: PUNT, PRETEND, or PLAN	Learn how to decrease stress, procure technology with confidence, and achieve district goals. Presented by Jeff Patterson, President, K12 Montana Inc.
11:00 - 12:00	Parlor 1009	FMLA and ADA Compliance	This session will be used to highlight various Leaves of Absences, but we will also have engaging conversations of what is working and what questions are out there revolving around Leaves of Absences. The outcomes from this session will hopefully leave with a better understanding of the labyrinth of Leaves of Absences and how to navigate compliance in the k-12 landscape. Presented by Thomas Reynolds, MS SHRM-CP, Human Resources Director, Title IX Coordinator, Belgrade School District #44.
11:00 - 12:00	Parlor 1001	Medicaid Reimbursements for IEP Based Services provided in Montana Schools	Come learn about Medicaid reimbursements for students with eligible direct care services. We will cover what services qualify and cover steps for submitting claims to DPHHS. Bring your questions and prepare to learn something new! Presented by Lisa Waterman, Medicaid Billing Program Manager, School Services of Montana.
11:00 - 12:00	Parlor 1018	Wage and Hour Law	This workshop is comprised of general information to provide insight and clarification regarding Wage and Hour laws and their application to school districts. Presented by Karla Ivie, Compliance Specialist, Employment Standards Division, Montana Department of Labor.
11:00 - 12:00	Parlor 1019	Improving School Facilities: Overview of the Capital Planning, Bond Election and Bond Financing Process	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 capital planning, bond election and bond issuance process and is currently in the construction phase. Presented by Julie Jones (Laurel School Districts), Bridget Ekstrom and Crystal Vogl (D.A. Davidson & Co.), Dan Semmens and Courtney Ellis (Dorsey & Whitney).

11:00 - 12:00	Parlor 1031	Show Me The Money: OPI Egrants Edition	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. Presented by Catlin Clifford, Lead Grant Accountant and Mindi Askelson, ESSER/E-Grants IT Systems Analyst.
11:00 - 12:00	Board Room	MASBO SBO State Certification Testing	Certification tests(s) will be administered to those who have made previous arrangements with Marie Roach.
1:40 - 2:40	Ballroom	OPI Federal Programs	This session is designed to assist clerks and school business professionals in better understanding how to track, manage, and report Title and Federal funds that their districts might receive. Specific topics will include Title programs and their objectives, the e-grants system, and coding and reporting expenses and activities. Additional information will be provided regarding school year timelines and deadlines as well as contact information for relevant staff at the OPI. Presented by Zach Hawkins, OPI Title I and Federal Programs Director, and Serena Wright, OPI Title III Specialist.
1:40 - 2:40	Yellowstone	OPI Teach Act	We will be presenting on the Teach Act (Teacher Incentive Program). How to know if your school and your teachers qualify, how to enter your teachers into Infinite Campus, what to expect from the OPI during the verification process, and how to remove your disqualified teachers from participating. We will have time for questions from schools at the end and are more than happy to try to answer all questions. Presented by the Office of Public Instruction (OPI) Finance Team.
1:40 - 2:40	Missouri	Meal Counting & Claiming for Child Nutrition Programs	Sponsors participating in the Child Nutrition Programs must have accurate and reliable systems for counting meals served. We'll discuss some requirements, such as: performing required edit checks, when/where to count meals, submitting claims for reimbursement, reimbursement rates, meal pricing, free and reduced meal benefit issuance, maximizing use of DCA, Medicaid eligibility, qualifying for CEP, how eligible students can qualify for the new Summer-EBT program, new non-congregate meal service options available to sponsors participating in the Summer Food Service Program (SFSP) and more. This overview is a deeper dive of some of the fundamentals involved with issuing program benefits to students and accurately counting/claiming meals. Presented by Rochelle Davies, RDN, LN, SNS, Specialist, School Nutrition Programs, Montana Office of Public Instruction and Alie Wolf, Data Analyst, School Nutrition Programs, Montana Office of Public Instruction.
1:40 - 2:40	Parlor 1010	Duties of the Board with MTSBA	What are the specific duties of the school board and the clerk to the board? Learn the best balance for board management and school administration. Q&A time may be available as the discussion unfolds. Presented by Tony Koenig, Director of Legal Services for the Montana School Boards Association.
1:40 - 2:40	Parlor 1009	New Title IX School Requirements	Federal updates and strategies the Title IX coordinator can implement to keep up with compliance in K-12. Presented by Thomas Reynolds, MS SHRM-CP, Human Resources Director, Title IX Coordinator, Belgrade School District #44.
1:40 - 2:40	Parlor 1001	Wage and Hour Law	This workshop is comprised of general information to provide insight and clarification regarding Wage and Hour laws and their application to school districts. Presented by Karla Ivie, Compliance Specialist, Employment Standards Division, Montana Department of Labor.
1:40 - 2:40	Parlor 1018	Medicaid Random Moment Training	The presentation will cover the Random Moment Time Study portion of the Montana Medicaid Administrative Claiming Program. We will provide training on the various components of the program, including participant lists, allowed activities, observation forms, and common errors. Presented by , Laurie Nelson, School Based Services Program Officer for Montana Medicaid, Health Resources Division of the Department of Public Health and Human Services (DPHHS).

1:40 - 2:40	Parlor 1019	Traditional and Alternative Construction Delivery Options/Methods:	Learn about innovative construction opportunities that are not traditional bond/building options, including the pros and cons for each type of district. Stretch your building reserve dollars further and maximize your potential for your district. <i>This presentation will be a panel discussion including Larry Crowder, Executive Director of MREA and MCS; Richard Batterman PC, Batterman Law Offices and Chief Legal Council for MREA and MCS; Lora Finnicum, District Clerk of Culbertson Public Schools; J. Mark Qualman, President of QuEst Services Corporation; and Nick Pancheau, Collaborative Design Architects.</i>
1:40 - 2:40	Parlor 1031	Presenting Budgets to Trustees	School finance is a massive subject and takes most of us a few years to get a handle on, right? And, public speaking is people's biggest fear! Mix these together and you get a significant portion of our duties! We are going to discuss ways to help our volunteer school board members feel comfortable with adopting the budgets and help you master your game. This is geared more for New Clerks, but if you're an old pro, come and share your wisdom. <i>Presented by Lacey Porrovecchio, School Business Official, Bigfork Public Schools and MASBO Board Member.</i>
1:40 - 2:40	Board Room	No session	no session
3:00 - 4:00	Ballroom	Master Student Activity Funds	Ready to ace next year's student activity funds? Curious about which funds go into the Student Activity Account? Want insider tips on best practices for internal controls? Join the Student Activities Committee for a dynamic session that will help you navigate the course without hitting any sand traps or water hazards! <i>Presented by Carrie Fisher, Belgrade School District; TJ Marmon, Ronan School District; and Stacy Montgomery, Forsythe School District.</i>
3:00 - 4:00	Yellowstone	OPI Federal Programs	This session is designed to assist clerks and school business professionals in better understanding how to track, manage, and report Title and Federal funds that their districts might receive. Specific topics will include Title programs and their objectives, the e-grants system, and coding and reporting expenses and activities. Additional information will be provided regarding school year timelines and deadlines as well as contact information for relevant staff at the OPI. <i>Presented by Zach Hawkins, OPI Title I and Federal Programs Director, and Serena Wright, OPI Title III Specialist.</i>
3:00 - 4:00	Missouri	OPI Tuition and HB 203	Overview of the tuition process and HB203 from the 2023 legislative session. <i>Presented by Barbara Quinn, School Finance Senior Manager and Andrea Mohammadi, Business Analyst, Office of Public Instruction.</i>
3:00 - 4:00	Parlor 1010	Medicaid Random Moment Training	The presentation will cover the Random Moment Time Study portion of the Montana Medicaid Administrative Claiming Program. We will provide training on the various components of the program, including participant lists, allowed activities, observation forms, and common errors. <i>Presented by , Laurie Nelson, School Based Services Program Officer for Montana Medicaid, Health Resources Division of the Department of Public Health and Human Services (DPHHS).</i>
3:00 - 4:00	Parlor 1009	Preparing for a Dept. of Labor Inspection?	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. <i>Presented by Brodie Loushin, Montana Schools Property & Liability Insurance Plan.</i>

3:00 - 4:00	Parlor 1001	MTSBA School Policy Management	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, Director of Policy Services and Senior Counsel with the Montana School Boards Association.
3:00 - 4:00	Parlor 1018	Fun with FRAM Infinite Campus User Meeting	We will discuss the FRAM tools available to all District Edition Infinite Campus Users, the magical connection to the Point of Sale Module in Campus, and the Direct Certification through OPI and importing that data to Campus. Presented by Tamara Blanchard, Infinite Campus Support Specialist, School Services of Montana.
3:00 - 4:00	Parlor 1019	Traditional and Alternative Construction Delivery Options/Methods:	Learn about innovative construction opportunities that are not traditional bond/building options, including the pros and cons for each type of district. Stretch your building reserve dollars further and maximize your potential for your district. This presentation will be a panel discussion including Larry Crowder, Executive Director of MREA and MCS; Richard Batterman PC, Batterman Law Offices and Chief Legal Council for MREA and MCS; Lora Finnicum, District Clerk of Culbertson Public Schools; J. Mark Qualman, President of QuEst Services Corporation; and Nick Pancheau, Collaborative Design Architects.
3:00 - 4:00	Parlor 1031	School Nutrition Programs 101	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, best practices with determining free and reduced meal eligibility through the certification and benefit issuance process, how to maximize use of the Direct Certification Application (DCA) system to save time and resources, qualify for CEP and issue Summer-EBT benefits to eligible students. Presented by Rochelle Davies, RDN, LN, SNS, Specialist, School Nutrition Programs, Montana Office of Public Instruction and Alie Wolf, Data Analyst, School Nutrition Programs, Montana Office of Public Instruction.
3:00 - 4:00	Board Room	No Session	no session
FRIDAY, JUNE 14			
8:30 - 10:00	Yellowstone - Missouri	School Law Update with MTSBA	An update on the latest issues in School Law with question and answer time. Presented by Andrew Vigeland, Director of Human Resources at the Montana School Boards Association.
10:15 - 11:00	Yellowstone - Missouri	MASBO Closing Session	