

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

AUGUST 2017

MASBO is dedicated to training and supporting the people responsible for business operations in Montana schools. Our goal is to enable members to manage the business in order to support education for Montana children.



MASBO Staff

Denise Williams, Executive Director
406-461-3659 or dwilliams@masbo.com
Marie Roach, Administrative Assistant/
E-rate Specialist
406-461-8804 or mroach@masbo.com



Montana Association of School Business Officials
Established in 1968

MASBO Celebrates 50 Years

At the June 2018 Summer Conference, the Montana Association of School Business Officials will celebrate its 50 year anniversary. As the logo to the left indicates, MASBO was established in 1968. I imagine that was when the idea of uniting this group as “a professional organization dedicated to researching, determining and disseminating better methods of school business administration” began. As with anything, the formality of making an idea a reality takes time, and in fact, the official minutes show the Organization Meeting, attended by 19 individuals from across the state, was held on November 19, 1969 at Jorgenson’s Holiday in Helena. At this meeting, **Orville Sather** (Havre) was elected presiding chairman and **Esther Nelson** (Bozeman) was elected secretary. This group formulated a tentative constitution and adopted an enacting clause which allowed election of an enabling committee empowered to make decisions that were deemed prudent and beneficial for the organization of MASBO until a formal constitution was adopted on April 14, 1970. At that time, **Orville Sather** was elected President, **John Campbell** (Helena) as Vice President, and **Jake Jacobi** (Columbia Falls) and **Elmer Stuhlmiller** (Harlem) as Directors. The next order of business was to establish dues at \$5.00 for an active membership. Charter members listed were:

Orville Sather (Havre)
Esther Nelson (Bozeman)
Jack Jacoby (Columbia Falls)
Marian Hovde (Conrad)
Janette Riddle (Glendive Jr. College)
Patricia Antovich (Missoula)
Karl Erickson (Great Falls)
Alice Huff (Havre)
William Jones (Billings)

John Campbell (Helena)
Elmer Stuhlmiller (Harlem)
Lola Geiger (Valier)
Vada Taylor (Glendive)
Patricia Janes (Deer Lodge)
John Rosenberger (Billings)
Bea Campbell (Havre)
P.O. Brush (Billings)

Immediately following adjournment of this meeting, the Board of Directors met and appointed Esther Nelson as Secretary of the Association.

MASBO has certainly changed in the past 50 years, yet the basic premise of the mission remains true. We are dedicated to training and supporting the people responsible for business operations in Montana’s schools.

Stay tuned for more MASBO history and fun facts in future newsletters ☺.
If you have a story from MASBO’s history that you’d like to share, please send it to me at dwilliams@masbo.com.



TRAINING OPPORTUNITIES

REGISTER NOW!

NEW CLERK ACADEMY

September 12 in Bozeman

Open to clerks/business managers and other business officials with less than 5 years' experience in school finance, budgeting and accounting. This one-day workshop will concentrate on the duties and deadlines that take place in the ensuing four months. Topics include Student Enrollment Counts, Quarterly & Annual Payroll Reports, Audits, Pupil Transportation and Grant Accounting. Click [here](#) to see the agenda and to register.

VETERAN CLERKS WORKSHOP

September 13 in Bozeman

Open to clerks/business managers and other business officials with 5 or more years' experience in school finance, budgeting and accounting. Topics for the day include Family Medical Leave Act, History of School Funding, SB261 Payment Reductions, Mitigating Fraud, and Group Discussions on Building a Strong Administrative Team and Effective Negotiations. Click [here](#) to see the agenda and to register.

SCHOOL FACILITIES PLANNING & FINANCING WORKSHOP

September 14 – 15 in Bozeman

This is a 1½ day workshop designed to provide guidance and ideas on how to approach school facilities planning and financing. We'll hear from all the appropriate experts, beginning with how to start planning, funding considerations, bond elections, MT Dept. of Labor Inspections, energy performance contracting, and accounting and auditing issues. Your peers will share their experience with recent projects, too! Click [here](#) to see the agenda and to register.



ASBO ANNUAL MEETING & EXPO

September 22 - 25 in Denver

This conference offers a lot of valuable workshops and seminars on school business topics and best practices, top notch keynote speakers, and opportunities to meet and network with school business officials nationwide. Click [here](#) to learn more and to register.

MONTANA CONFERENCE OF EDUCATION LEADERSHIP (MCEL)

October 18 – 20 in Billings

The 2017 MCEL Conference, *"Leadership for Transforming Education, Empowering Montana Students"* will be held October 18 - 20 and is co-hosted at the DoubleTree Inn and Northern Hotel in Billings. Go to www.mcel.org for registration, conference schedule and hotel reservation information.



OPI SCHOOL STAFFING/TEAMS PROGRAM FOR 2017-2018

TEAMS TO OPEN AUGUST 15

The Office of Public Instruction will open the 2017-2018 TEAMS program August 15 through November 1. Prepare now by ensuring your authorized representative and anyone else entering data has access to TEAMS. For more information about the OPI School Staffing Project and TEAMS, click [here](#).



TEAMS WORK SESSIONS

OPI will host several full day work sessions at various locations around the state to help you complete with your annual accreditation data collection. You can expect to receive help with every aspect of TEAMS, use your own data and work at your own pace. For more information and a link to online registration, click [here](#).

MASBO Board of Directors

| | | | |
|-------------------|--|-------------------|---|
| President | Cindy Foley, West Valley Schools | Region 1 Director | Noreen Anderson, Hellgate K-8 School |
| Vice-President | Lorie Carey, Jefferson Co. High School | Region 2 Director | Belinda Klick, Sun River Valley Schools |
| Past President | Tammy Tulberg, Target Range Schools | Region 3 Director | Cheri Nygard, Wolf Point Schools |
| Fiscal Agent | Kim Aarstad, East Helena Schools | Region 4 Director | Kevin Patrick, Anaconda Schools |
| Ex-Officio, MSUIP | Denise Williams | Region 5 Director | Rita Huck, Huntley Project Schools |
| Ex-Officio, OPI | Kara Sperle | Region 6 Director | Jen Mettler, Baker Schools |

Kevin Patrick Appointed Region 4 Director

The MASBO Board of Directors appointed Kevin Patrick of Anaconda Schools to serve as Region 4 Director, filling the vacancy brought on by Lorie Carey's election to MASBO Vice-President at last June's summer conference. In addition to attending board meetings in October, January and February, Kevin will plan and host the 2018 Spring Workshop for Region 4, when an election can be held to choose someone to serve the remainder of the term. **Welcome, Kevin!**



P-CARD NEWS

MASBO P-CARD PURCHASES REPORT

P-Card purchases for three months of the rebate year (April - June) totaled **\$5.69 million** with **125** school districts and special education cooperatives participating in the program. At the same time last year, we had 109 participants with \$5.54 million in total purchases. Click [here](#) to see the current year P-Card purchases report.

DID YOU RECEIVE YOUR REBATE CHECK?

On July 28, 2017, we issued rebate checks totaling \$ 196,971.90, which represents a 1.05% rebate on total purchases made April 2016 through March 2017. Click [here](#) to see the rebate schedule posted on the MASBO website. Please deposit your check as soon as possible, or if you didn't receive it, contact Marie Roach at mroach@masbo.com or call her at (406) 461-8804

MASBO CERTIFICATION PROGRAM

THANK YOU, DONNIE McVEE

Donnie McVee has served as chairman of the Certification Committee since January 2016. Under her leadership, the Certification Program successfully reviewed and updated all test questions, developed a marketing plan to promote the program and, for the first time, provided test preparation training for Test #1 at the 2017 Summer Conference. Unfortunately, Donnie recently had to step down as chairman due to other commitments, and the remaining members are in the process of considering who will lead this great work.

TOP TEN REASONS TO GET YOUR MCSBO

#8 Continued Professional Development

The prerequisite and post-testing professional development requirements give you the incentive to partake in the myriad of trainings that are available, which is always a good thing. Also, through the testing process, MASBO board would have a better idea of what areas they need to concentrate on for professional development offerings.

WANT TO TAKE A TEST?

Click [here](#) to access an online registration form that will serve as a request to take a certification test. Marie will contact you to work out the details. NOTE: If you'd like to take a test during MCEL, please submit your request by **October 1**.



MTSBA Database Updates Made Easy!

Question: How do I access and make changes to our trustees and administrative team on the MTSBA database?

Answer: You'll always find the link to the database on the top menu of mtsba.org. Here's a quick link:

<https://ams.embr.mobi/index.aspx?C=ZgfON>

- After logging in, you'll be taken to your district's main page.
- Click on people.
- To delete a person, click on the trash can next to the name.
- To edit, click on edit.
- You can go through the other tabs as well, making sure your district's information is correct.

Important reminder: If someone from your district quits or is terminated, inactivate them immediately – especially if they have administrative access.

If you have questions, please don't hesitate to contact Wendy at wbrenden@mtsba.org or (406) 442-2180.

Broadband for Montana Schools

[House Bill 390](#) was passed in the 2017 Legislative Session and included an amendment to 20-9-534, MCA that directs \$1 million in each year of the biennium to the Montana Department of Commerce (\$2 million total) for funding to schools to use as a match for FCC E-rate program funds. The Broadband in Montana Schools Program will enable schools to upgrade their broadband, boosting access to high-speed internet and providing students with more digital learning tools. The Broadband for Montana Schools Program matching funds are available for all Montana K-12 schools, including elementary schools, high schools, K-12 school districts, and consortiums of K-12 schools, as those entities are defined in Title 20, Chapter 6, MCA. **Applications will be accepted on a continuous basis until beginning August 1, 2017 and until May 1, 2019.** Click [here](#) to see the DOC's webpage, and contact them at DOCBroadband@mt.gov or call 406-841-2770 if you have any questions about the Broadband for Montana Schools Program.

FREE EVENING PRESENTATION

The Montana School Property & Liability Insurance Program (MSPLIP) is offering workshops in September at various locations around the state. They promise discussion on legal topics that are both timely and applicable to all school districts.

Contact [Al Sipes](#) as MSPLIP for more information and to RSVP.

| | | |
|------|-------------|---------------------------------|
| 9/5 | Lewistown | Yogo Inn |
| 9/6 | Bozeman | Bozeman Public Schools |
| 9/11 | Missoula | MCPS Business Bldg. Board Rm. |
| 9/13 | Miles City | Custer County High School |
| 9/20 | Great Falls | Great Falls Public Schools |
| 9/25 | Polson | Polson High School Auditorium |
| 9/27 | Laurel | Laurel Board Room |
| 10/5 | Sidney | Sidney Middle School Auditorium |

MASBO ENDORSES THESE PROGRAMS

| | |
|---|---|
|  | <p>Healthcare Reform Section 125 Services Health Savings Account Services Angie Newman, State Manager II 877-589-2544, ext. 352 angie.newman@americanfidelity.com http://www.americanfidelity.com/home.aspx</p> |
|  | <p>Montana Schools Group Insurance Authority Workers Compensation Insurance Shawn Bubbs, Director of Insurance Services 406-457-4500 sbubbs@mtsba.org http://www.msgia.org/home</p> |
|  | <p>Health, Dental, Vision, Life and Long-Term Disability Benefits Andy Holmlund, Chief Executive Officer 406-457-4400 aholmlund@ms-sf.org http://mustbenefits.org/</p> |
|  | <p>Montana Schools Unemployment Insurance Program Theresia LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</p> |
|  | <p>Montana Schools Property & Liability Insurance Plan Dave Pillatzke, Program Manager 406-457-4531 dpillatzke@paynewest.com http://msplip.com/</p> |

IMPORTANT DATES & DEADLINES – SEPTEMBER 2017

SEPTEMBER 1

Last day to submit grant amendments for grant projects ending September 30, 2017

Last day to submit grant amendments (budget or program modifications) for projects that will end September 30.

- IDEA, Part B
- IDEA, Part B; CSPD
- IDEA, Preschool
- IDEA, Part D: RTI, Significant Needs
- Title I, Part A, Improving Basic Programs
- Title I, Part C, Migrant Education
- Title I, Part D, Neglected and Delinquent
- Title I, School Support
- Title II, Part A, Improving Teacher Quality
- Title II, Part A, Improving Teacher Quality – State Level
- Title II, Part B, Math Science Partnerships
- Title III, Part A, English Language Acquisition
- Title VI, Part B, Rural Low-Income
- Title X, Part C, McKinney-Vento Homeless Education
- Project AWARE Mental Health Grant (check with the program administrator or grant accountants for specific deadlines)

[OPI Grants Calendar](#)

[State and Federal Grants Handbook](#)

SEPTEMBER 10

File school food program claim for reimbursement with OPI

Claims for reimbursement are due on the 10th of each month; except months with less than 10 operating days. If a month has less than 10 operating days, combine the month with another (i.e., combine August and September on the September claim and May and June on the May claim).

[School Nutrition Programs Checklist](#)

[Reimbursement Rates for FY2017](#)

OPI pays grant cash requests

OPI pays grant cash requests submitted by the 25th of the previous month.

[OPI Grants Calendar](#)

[E-Grants System](#)

Log in to your district's account, or click on Public Access, then Vendor Payee Details

Birthday cutoff date for 19-year-olds in ANB counts

Students who reach age 19 on or before September 10 of the school year may not be counted for ANB

[20-1-101, MCA](#)
[20-5-101, MCA](#)

Birthday cutoff date for 5-year-olds entering kindergarten

The trustees of an elementary district shall establish or make available a kindergarten program capable of accommodating, at a minimum, all the children of the district who will be 5 years old on or before September 10 of the school year for which the program is to be conducted or who have been enrolled by special permission of the board of trustees.

[20-7-117, MCA](#)

IMPORTANT DATES & DEADLINES – SEPTEMBER 2017

SEPTEMBER 15

Trustees Financial Summary (TFS) due to OPI

County superintendent submits annual reports to OPI, including the budget form for each district. In MAEFAIRS, both the TFS and Budget are submitted at the same time.

[20-9-134, MCA](#)

SEPTEMBER 22

OPI makes K-12 BASE aid payments

(DSA) Direct State Aid
(QEC) Quality Educator Component
(ARC) At Risk Student Component
(IEA) Indian Education for All
(SAG) Student Achievement Gap
(SPED) State Special Education Payments
~~*(TECHF) Technology Funding~~
~~** (D4A) Data for Achievement~~
~~*** (NRD) Natural Resource Development~~

[FY2018 Payment Schedule](#)

~~* Redirected as per HB390~~
~~** Eliminated for FY2018 per SB261~~
~~*** Redirected as per HB647~~

SEPTEMBER 25

Grant cash request due to OPI

Grant cash requests made by this date will be paid on October 10.

[OPI Grants Calendar](#)

SEPTEMBER 30

Last day to obligate funds for grant projects ending September 30, 2017

Last day to obligate funds for projects that will end September 30.

- IDEA, Part B
- IDEA, Part B; CSPD
- IDEA, Preschool
- IDEA, Part D: RTI, Significant Needs
- Title I, Part A, Improving Basic Programs
- Title I, Part C, Migrant Education
- Title I, Part D, Neglected and Delinquent
- Title I, School Support
- Title II, Part A, Improving Teacher Quality
- Title II, Part A, Improving Teacher Quality – State Level
- Title II, Part B, Math Science Partnerships
- Title III, Part A, English Language Acquisition
- Title VI, Part B, Rural Low-Income
- Title X, Part C, McKinney-Vento Homeless Education
- Project AWARE Mental Health Grant (check with the program administrator or grant accountants for specific deadlines)

[OPI Grants Calendar](#)

| SEPTEMBER 30 (continued) | | |
|--|--|--|
| Last day for actual cash transfer to/from Compensated Absences Fund and Litigation Reserve Funds | Actual cash transfers to/from the Compensated Absences Liability Fund that were accrued at fiscal year end must be made by September 30 of the next fiscal year. | 20-9-512, MCA ARM 10.10.312 |
| | Actual cash transfers to/from the Litigation Reserve Fund that were accrued at fiscal year end must be made by September 30 of the next fiscal year. | 20-9-515, MCA ARM 10.10.315 |

IMPORTANT RESOURCES

- [MASBO Clerk and Superintendent Duty List](#) to define and discuss the division of duties between the clerk/business manager and the superintendent.
- [MASBO Payroll Manual](#) to assist you with the payroll process.
- [MASBO Student Activity Manual](#) contains recommended guidelines for the recordkeeping for extracurricular finances.
- [E-Grants Access Select Instructions](#) for instructions on how to access your grant information after you've logged in to the E-Grants System.

OPI SCHOOL NUTRITION PROGRAM

- [FY2017-18 Program Checklist](#) to check off School Nutrition Program requirements as they are completed.
- [FY2017-18 Administrative Update Packet for Schools](#) provides all the information you need to meet your administrative responsibilities associated with your district's food service program.
- **Wednesday Webinars** will be held from **1:00 – 2:00 p.m.** on the following dates:
 - August 23 Fresh Fruit & Vegetable Program and Harvest of the Month
 - August 30 Entering Claims in MAPS
 - September 6 DCA/Free and Reduced Application – Live Q&A session
 - October 4 Verification

PUPIL TRANSPORTATION NEWS

1st Semester Bus Inspections Due

At least 30 days prior to the beginning of first semester, the Montana Highway Patrol must inspect all school buses used to transport students. If necessary, the buses must be re-inspected before the beginning of the semester (see [ARM 10.7.101\(2\)\(e\)](#)).

Updated Bus Standards Effective October 13

At its July 13 meeting, the Board of Public Education adopted [new bus standards](#) that are effective **October 13, 2017**. Please review the changes, which are highlighted throughout the document, and share with your pupil transportation director and other staff involved in your district's pupil transportation program.

2017 National School Bus Safety Poster Contest

This year's theme is ***My Driver – My Safety Hero!*** Click [here](#) to see contest information and rules. One winner in each category from each state must be sent to the NAPT Headquarters by October 1, 2017. Contact Donell Rosenthal, State Pupil Transportation Director, at (406) 444-3024 for information on how to enter the state contest.

MASBO EXHIBITOR MEMBERS

| | | |
|---|--|--|
| Aflac Rob Cook r_cook@us.aflac.com | American Fidelity Assurance Co. Angie Newman angie.newman@americanfidelity.com | Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com |
| Edie Barnard Edie.barnard56@gmail.com | Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com | Bruco, Inc. Adam Uselman, V.P.-C.O.O. adambruco@gmail.com |
| D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com | Fellon Insurance Services Dale Fellon fellonins@msn.com | Ron Foltz CPA firm Ron Foltz, CPA Ron.foltz@ronfoltzcpa.com |
| Foxie Lady Computers, Inc. David Bardwell foxieladyc@aol.com | Frontline Technologies Peter Lane plane@frontlineed.com | Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com |
| Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com | Insurance Management Services of MT John R Boyer john@imsvest.com | Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com |
| Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com | Montana Public Employees Retirement Administration Jenny Weigand jweigand@mt.gov | MSGIA-WCRRP Shawn Bubb sbubb@mstba.org |
| Montana Schools Property & Liability Insurance Plan (MSPLIP) Dave Pillatzke dpillatzke@paynewest.com | Montana Schools Unemployment Insurance Program (MTSUIP) Theresia LeSueur tlesueur@mtsba.com | Montana Unified School Trust Andy Holmlund aholmlund@ms-sf.org |
| National IPA and TCPN Shelley Andrews shelley.andrews@nationalipa.org | New Hope Technology Foundation John Hughes, Senior Consultant john@newhopetech.org | Pine Cove Consulting Brandan Bassett bbassett@pinecc.com |
| Rudd & Company, PLLC Julie Kostecky, CPA, CVA jkostecky@ruddco.com | School Specialty Scott Wilkey scott.wilkey@schoolspecialty.com | Schoolhouse IT Jeffrey Patterson jeffp@schoolhouseit.com |
| Southwest MT School Services Bruce Grubbs bgrubbs@swmss.ccsend.com | Stifel Nicolaus Bryan Stelmack yroybal@stifel.com | TimeClock Plus James Baker sales@timeclockplus.com |
| Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.com | Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com | VALIC Michael Hart michael.hart@valic.com |
| Jeffrey Weldon Felt, Martin, Frazier & Weldon, PC JWeldon@feltmartinlaw.com | Wipfli LLP Kim Dare, CPA kdare@wipfli.com | |

Fitting in Fitness

Beating Fitness Road Blocks

Do you want to be physically active but aren't sure how to get started? There may be some road blocks holding you back. Keep in mind these common reasons for dodging workouts and how to beat them:

- **I'm out of shape from not being active** — start with small amounts of motion that you enjoy, such as walking or riding a bike, and slowly raise the amount each day.
- **I'm too busy** — fit in fun 10-minute sessions of motion where you can, such as a brisk walk at lunch or playing tag with your kids.
- **It costs too much** — try low-cost ideas, like dancing to upbeat music in your living room, taking a walk after dinner or jumping rope.

Get moving today and fit physical activity into your daily life.



BlueCross BlueShield
of Montana



A Division of Health Care Service Corporation, a Mutual Legal Reserve Company,
an Independent Licensee of the Blue Cross and Blue Shield Association

bcbsmt.com

Weight, You're Going Down!



Taking physical activity to the next level

When you are more active, you'll be surprised at how much better you feel. Aim to slowly add to your workouts so you can better meet your weight management goals.

Try these easy ways to step up your game:

- Go from brisk walking to jogging.
- Swim or bike faster.
- Add pushups and squats twice a week.
- Add on to active time, such as walking an extra 15 minutes more per week.
- Mix in new ideas to change it up, such as playing ball, martial arts or gardening.

Just what the doctor ordered

Low levels of physical activity are safe for most people. But it's always good to talk to your doctor before starting an exercise program. They'll suggest the best types of activity for you. How many calories does physical activity use? A 154-pound man (5' 10") will use up about the number of calories listed doing each activity below. **Those who weigh more will use more calories, and those who weigh less will use fewer.** The calorie values listed include both calories used by the activity and the calories used for normal body functioning.

| Approximate calories used by a 154-pound man | | |
|--|-----------|---------------|
| Moderate physical activities: | In 1 hour | In 30 minutes |
| Hiking | 370 | 185 |
| Light gardening/yard work | 330 | 165 |
| Dancing | 330 | 165 |
| Golf (walking and carrying clubs) | 330 | 165 |
| Bicycling (less than 10 miles per hour) | 290 | 145 |
| Walking (3.5 miles per hour) | 280 | 140 |
| Weight Training (general light workout) | 220 | 110 |
| Stretching | 180 | 90 |
| Vigorous physical activities: | In 1 hour | In 30 minutes |
| Running/jogging (5 miles per hour) | 590 | 295 |
| Bicycling (more than 10 miles per hour) | 590 | 295 |
| Swimming (slow freestyle laps) | 510 | 255 |
| Aerobics | 480 | 240 |
| Walking (4.5 miles per hour) | 460 | 230 |
| Heavy yard work (chopping wood) | 440 | 220 |
| Weight lifting (vigorous effort) | 440 | 220 |
| Basketball (vigorous) | 440 | 220 |