# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS APRIL 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 <a href="mailto:dwilliams@masbo.com">dwilliams@masbo.com</a> Marie Roach, Administrative Assistant/ E-rate Specialist 406-461-8804 or <a href="mailto:mroach@masbo.com">mroach@masbo.com</a>

# MTSUIP/MTSBA/MASBO HOT TOPIC EMPLOYMENT SEMINAR in Helena April 18, 2017

8:30 a.m. - 4:00 p.m.

**Montana School Boards Association** 

863 Great Northern Blvd. 4th Floor Conference Room

Send your custodian, kitchen and transportation supervisors, athletic directors, principals, superintendents, business officials and trustees to this important training covering:

- Title 2 Benefits
- Criminal Background Checks
- Spring Hiring Decisions
- Non-Discriminatory Employment Practices

**FREE** to MTSUIP member districts – you can send as many people as you want! All non-MTSUIP members will be charged \$125 early registration fee per participant or \$150 onsite registration fee per participant. To register, click **here.** 







#### ASSISTANCE FOR BUSINESS CLINIC

The Assistance for Business Clinic is hosted by the following Montana state agencies:

- Department of Labor & Industry
- Department of Public Health & Human Services
- Department of Revenue
- Employer Support of the Guard & Reserve.

This is good training for your human resources and payroll staff! Click  $\underline{\textit{here}}$  to see the schedule and fees.

Click <u>here</u> to register.

# MSCPA HOSTS 2017 GOVERNMENTAL ROUNDTABLE AND GAAFR CONFERENCE

The Montana Society of CPAs'
Governmental Audit, Accounting &
Financial Reporting Committee offers a
conference designed for auditors of local
governments, representatives of city,
county and district governing boards, and
accountants from city, county and school
district business offices.

**Hilton Garden Inn - Bozeman**To register, click *here* or call 406-442-7301

Governmental Roundtable – May 18
10:00 am – 3:00 pm 5 hours CPE credit
This year's discussion will have
information from the MT Department
of Administration on reporting
problems trends, the MT Board of
Investments, a legislative update and
an update from OPI. You will be able
to bring your own ideas for discussion.

GAAFR Conference - May 19
8:00 am - 4:00 pm 8 hours CPE credit
Speaker Wes Galloway will provide an in-depth look at all of the recent and forthcoming GASB guidance, and look over the horizon at future accounting changes, including potential changes to the governmental reporting model.

# **MASBO** Board of Directors

President	Tammy Tulberg, Target Range Schools	Region 1 Director	Noreen Anderson, Hellgate K-8 School
Vice-President	Cindy Foley, West Valley Schools	Region 2 Director	Belinda Klick, Sun River Valley Schools
Past President	Mike Arnold, Billings Schools	Region 3 Director	Rhonda Opp, Medicine Lake Schools
Fiscal Agent	Kim Aarstad, East Helena Schools	Region 4 Director	Lorie Carey, Jefferson Co. High School
Ex-Officio, MTSUIP	Denise Williams	Region 5 Director	Rita Huck, Huntley Project Schools
Ex-Officio, OPI	Kara Sperle	Region 6 Director	Jen Mettler, Baker Schools

# SPRING REGIONAL WORKSHOPS AND DIRECTOR ELECTIONS

Thanks to everyone who was able to attend the Spring Regional Workshops, and congratulations to the following Region Directors:

- Region 3: Cheri Nygard (Wolf Point) was elected to serve for the three-year term July 1, 2017 June 30, 2020.
- > Region 6: Jen Mettler (Baker) was re- elected to serve another three-year term July 1, 2017 June 30, 2020.

#### UPDATE ON VP NOMINATIONS

As of today, we've received two nominations for MASBO Vice-President. **Lorie Carey** (Jefferson High School) was nominated via email and **Jane Knudsen** (Malta) was nominated at the Region 2 spring workshop. We'll invite Lorie and Jane, as well as any other nominees, to share their thoughts on this important leadership position in the May newsletter and at the summer conference, where we'll conduct an election and choose our next VP!

You can still submit a nomination by: 1) send an email to Denise at <a href="mailto:dwilliams@masbo.com">dwilliams@masbo.com</a>, or 2) nominate the person at the 2017 MASBO summer conference opening business meeting.

# **CERTIFICATION PROGRAM NEWS**

The MASBO Certification Committee has been hard at work revamping, rebranding and improving the Certification Program. Here's just a few of their accomplishments in the past six months.

Montana Certified School Business Official (MCSBO) replaces Montana Registered School Business Official (MRSBO). Click <u>here</u> to view of list of active MASBO members who have earned this certificate. Watch for a new pin design, too!

**Certification Test Preparation** will be available at the MASBO Summer Conference. Mark your calendar for <u>Wednesday</u>, <u>June 14</u> at 8:30 a.m. and plan to attend a 3-hour session that will provide an overview of the certification program and preparation for taking Test #1. Certification Committee members will cover the following subject areas: Board Meetings & Minutes, Elections, Payroll and Pupil Transportation. For those who have made the proper application to begin the testing process (or need to re-test), Test #1 will be given at 3:00 Wednesday afternoon.

# THANK YOU!

Many thanks to the Certification Committee for your time and great ideas:

- > Donnie McVee (Laurel), Chair
- Kathy Preeshl (North Star)
- Nicki Beyer (Sidney)
- Sandy Watkins (Geyser)
- Kelly Doornek (Glasgow)

# TOP TEN REASONS TO GET YOUR MCSBO

#### **#10.** Mentoring Knowledge

Remember when you were a new clerk and EVERYTHING was new, different and confusing? With the knowledge you have acquired on the job and preparing for certification tests, **and** your Montana Certified School Business Official standing, new clerks can depend on you with confidence to mentor them. As you share your knowledge, skills and best practices, you will be helping new clerks through the maze of tasks, agencies and obstacles that overwhelm them. As new clerks watch you handle situations competently, they will be encouraged that someday, they TOO will be as confident and knowledgeable as you!



# P-CARD NEWS-----

# HAVE YOU SENT YOUR ANNUAL AUDIT REPORT TO BMO?



Your master agreement requires you send your annual audit report to the BMO Financial Group. Here's how:

Send an electronic (.pdf) copy to: pcard.reviews@bmo.com

---OR---

Mail a hard copy to (overnight or tracked mail is suggested):

BMO Harris Bank Institutional Markets 5/C Attn: Jeremiah Wallen

111 West Monroe Street Chicago, IL 60603

---and, to make it even easier ---

Add BMO to your distribution list

If you have an email distribution list of people/entities that you send your audited financials to each year, add <a href="mailto:people/entities">people/entities</a> that you send your list.

# **BMO SPEND DYNAMICS**

Special thanks go out to Teresa Cornell (Harlem Schools) and Kathy Preeshl (North Star School) for taking time to write up some tips and instructions on the new *Spend Dynamics* system.

Click *here* to see step-by-step instructions on the following and more:

- How to see and change credit limit and available credit limit
- ► How to see unposted transactions
- ➤ How to print all statements
- How to print an individual statement
- How to view recent transactions on each card

Click <u>here</u> to see *Spend Dynamics* Tutorials on the Illinois ASBO p-Card website.

If I got a dollar every time I heard "Mom"





# PAYROLL REMINDERS

#### Quarter 1 Form 941

File your 1st Quarter (January – March) form 941 by April 30, 2017

- Form 941
- Form 941 Instructions

# **End of Year Payroll Tasks**

Now is a good time to prepare for end-of-school-year payrolls, terminations and retirements.

See the MASBO Payroll Manual, page 22 for help. Click here.

# MASBO ENDORSES THESE PROGRAMS



Montana Schools Property & Liability Insurance Plan **Dave Pillatzke,** Program Manager 406-457-4531

dpillatzke@paynewest.com
http://msplip.com/



Health, Dental, Vision, Life & Long-Term Disability Benefits

**Andy Holmlund,** Chief Executive Officer 406-457-4400

aholmlund@ms-sf.org
http://mustbenefits.org/



Workers Compensation Insurance **Shawn Bubb,** Director of Insurance Services 406-457-4500

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Unemployment Insurance Program
Theresia LeSueur, Director
406-457-4407
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Healthcare Reform Section 125 Services Health Savings Account Services **Cheryl Brandt,** State Manager 877-589-2544, ext. 353

<u>Cheryl.Brandt@americanfidelity.com</u> http://www.americanfidelity.com/home.aspx

IMPORTANT DATES & DEADLINES – MAY 2017					
MAY 1					
Deadline to apply for isolation status	By May 1, trustees apply to County Superintendent for school isolation status when ANB will be less than 10 for elementary or less than 25 for high school for the second consecutive year.	MCA 20-9-302(1)			
Late voter registration is closed between noon – 5:00 p.m.	Late registration is closed between noon and 5pm the day before the election. Electors may late register on election day at the office of the county election administrator.	MCA 13-2-304(1)(b) School Elections Calendar 2017			
Deadline for absentee ballot requests (by noon)	Voters who wish to vote absentee may request an absentee ballot in writing or in person until noon the day before the election.  **Remember to include a section on the absentee ballot application allowing the voter to become part of the biennial absentee list.	MCA 13-13-211 MCA 13-13-214			
County election administrator delivers certified copy of the lists of registered electors to the school election administrator	Before the day of election, the county election administrator shall deliver a certified copy of the lists of registered electors for each voting location to the district. The district shall deliver the lists to the election judges prior to the opening of a voting location.	MCA 20-20-313			
MAY 2					
SCHOOL ELECTION DAY	The election administrator must prepare the polling places, printed ballots, ensure election judges are present, and conduct a fair and unbiased election (See Election Procedures).  Notify election judges of the names of write-in candidates	Title 13 MCA 20-20-105 MCA 20-20-401(3) MCA 20-20-411 School Election Manual (see Sections VI and VII) 2016 Election Judges Handbook Display of Instructions for Electors Election Judges Oath			
MAY 8					
First date that provisional ballots may be counted	Following the election, unresolved provisional ballots are sealed. These ballots may not be opened until after 3pm on the 6th day after election. At that time election judges convene and a determination is made as to whether or not the ballots are counted. If there are provisional ballots in a school election, the canvass may not occur until after all provisional ballots are resolved.	MCA 13-15-207 Provisional Ballot Instructions			

IMPORTANT DATES & DEADLINES – MAY 2017				
MAY 10				
File school food program claim for reimbursement with OPI	each month; except months with less than 10			
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 <sup>th</sup> of the previous month.	E-Grants System Log in to your district's account, or click on Public Access, then Vendor Payee Details		
MAY 17				
Trustees canvass the votes, issue certificates of election, and publish results.	Following receipt of the tally sheets from all polls and within 15 days after the election, the trustees review the tally sheets compiled by the election judges to ascertain their accuracy. Recounts are ordered, if necessary. If the tally is complete and accurate, trustees issue certificates of election to successful candidates. The canvassed results shall be published immediately in a newspaper that will give notice to the largest number of people in the district.	MCA 20-20-415 MCA 20-20-416 Canvass of Votes and Results Certificate of Election of Trustee		
Deadline for trustees to hold organizational meeting	The trustees of each district shall annually organize as a governing board of the district after the regular school election day and after the issuance of the election certificates to the newly elected trustees, but not later than 15 days after the election.	MCA 20-3-321 School Board Organization		
MAY 19				
OPI makes K-12 BASE aid payments	(GTB) Guaranteed Tax Base Aid (SBG) School Block Grants (FAC REIM) Facilities Reimbursement	FY2017 Payment Schedule State Payments to School and Cooperatives		
MAY 24				
Second semester transportation claims due	Submit second semester transportation claims online to the Superintendent of Public Instruction and transmit one copy of each claim to the County Superintendent of Schools.  • TR-5 Claim for State Reimbursement for Individual and Isolated Transportation  • TR-6 Claim for Reimbursement for School Bus Transportation	MCA 20-10-145(2) A.R.M. 10-7-104(2)(a) OPI Transportation Forms Calendar		
MAY 25				
Grant cash request due to OPI	Grant cash requests made by this date will be paid on June 10.	OPI Grants Calendar		

# HANDY RESOURCES

# **ELECTION DAY - MAY 2, 2017**

# **Important Election Resources:**

- School Elections Calendar 2017 (click <u>here</u>). The calendar includes all the important deadlines for this election and includes links to sample forms.
- Mail Ballot Elections Calendar 2017 (click here). The calendar includes all the
- important deadlines for conducting an election by mail ballot.
- **2017 Election Manual** (click <u>here</u>). Contains frequently asked questions about all phases of school elections.
- Guidance to County Election Administrators and School Clerks (click <u>here</u>).
  Co-authored by the Secretary of State's Office and the Office of Public Instruction, this document helps sort out the duties and responsibilities of the county election office and the school district office for school elections.



#### MONTANA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS



The MSCPA has developed the Audit RFP Center to help organizations needing an audit, and CPA members who specialize in all types of audits, find one another. The process is free, simple and a great way to connect with the accounting professionals you need. Prepare your audit Request for Proposals (RFP) and email it as a Word file or PDF to <a href="mscpa@mscpa.org">mscpa@mscpa.org</a>. Your audit RFP will be posted on the MSCPA website in their Members Only section through your submission deadline. Please contact Margaret Herriges, MSCPA Communications Director at <a href="margaret@mscpa.org">Margaret@mscpa.org</a> or 406-442-7301 for more information. To help you write an RFP, click <a href="margaret@mscpa.org">here</a> to see the Audit RFP Center Audit Checklist.

# TEACHERS RETIREMENT SYSTEM

#### TRS Fact Sheets

Click <u>here</u> to check out fact sheets on various topics that provide detailed information about TRS processes and procedures.

# TRS Employer Contribution Rates for FY2018

To help you develop your retirement fund budgets, you can click <u>here</u> to see the TRS employer contribution rates for FY2018.

# MONTANA DEPARTMENT OF LABOR WAGE & HOUR DIVISION

# Wage & Hour Labor Law Quick Reference Guide

Click <u>here</u> to access this handy reference guide to Montana's wage and hour laws. Note that this online resource provides general information only and should not be considered as an official document. If you have a question as to the application of the law to any worker, write or call the Wage and Hour unit at (406) 444-5600 or <a href="https://www.mtwagehourbopa.com">www.mtwagehourbopa.com</a>.

#### **Prevailing Wage Guide on Public Works Contracts**

The Montana Prevailing Wage Law requires the prevailing wage rates established by the Montana Department of Labor and Industry be paid on public works contracts. The intent of the law is to:

- protect local labor markets,
- maintain the general welfare of Montana workers on public works projects,
- eliminate wage cutting as a method of competing for public contracts,
- maintain wages and rates paid on public works at a level to attract highly skilled laborers performing quality workmanship, and
- prevent the rate of wages from adversely affecting the equal opportunity of Montana contractors to bid on public works.

Click *here* for more information posted on the MT DOL website.

MASBO EXHIBITOR MEMBERS				
Insurance Management Services of Montana (IMS) John R Boyer john@imsvest.com	Intermountain Building Operators Association (IBOA) Clarence Wieting iboa@intBOA.org	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org		
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Foxie Lady Computers, Inc. David Bardwell foxieladyc@aol.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com	Stifel Nicolaus Bryan Stelmack yroybal@stifel.com		
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# Get in the Toned Zone



# Knowing The Right Amount Of Physical Activity

Staying active helps to keep your health and weight in check. Physical activity is any form of movement that uses energy. Follow these guidelines for a healthy start.

- Get active. Some physical activity is better than none. Any amount of movement will result in some health payback.
- Work up to 150 minutes of moderate or 75 minutes of vigorous movement each week.
   Try walking briskly, running or dancing.
- Do muscle strengthening two days a week. Fire your muscles by climbing stairs, doing pushups or lifting dumbbells.
- Stretch your muscles and joints by doing yoga, side stretches or touching your toes. Flexibility is a big part of the plan.

You'll tone up and trim down when you get in the fitness zone.



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





# Other paybacks of moving more

Regular physical activity isn't just good for your frame. It can also help you feel better about yourself.

Being active can result in:

- More energy
- Faster, sounder sleep
- Greater self-confidence
- Better ways to cope and relax
- · Shared time with family or friends

#### Break it and make it

If making time for 150 minutes of activity per week sounds tough, try breaking it up into smaller bits. Ten minutes of mid-level motion three times a day will give you the same perk as one 30-minute session. Think about taking three 10-minute walks. Maybe you can walk at lunch, on your break and after dinner.

By picking physical activities you enjoy and that match your abilities, it will help ensure that you stick with them. If you're not sure where to start, here are some examples.

Example 1: Moderate Intensity Activity and Muscle Strengthening Activity						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 minute brisk walk	30 minute brisk walk	30 minute brisk walk	Weight training	30 minute brisk walk	30 minute brisk walk	Weight training
Total: 150	Total: 150 minutes moderate-intensity aerobic activity + 2 days muscle-strengthening activity					
Example 2: Vigorous Intensity Activity and Muscle Strengthening Activity						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	25 minute jog		25 minute jog and weight training		Weight training	25 minute jog
Total: 75 minutes vigorous-intensity aerobic activity + 2 days muscle-strengthening activity						

bcbsmt.com

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Sources: National Heart, Lung and Blood Institute; Centers for Disease Control and Prevention