MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empower School Business Leaders Through Education **FEBRUARY 2019**

SIGN UP FOR SPRING TRAINING!

It's not too late to sign up for MASBO Spring training sessions. Dates and locations for full-day Budget Workshops, Regional Workshops and Budget Basics are shown below.

Click on the link of the workshop you want – you'll see an agenda, hotel reservation information and a link for registration.

Please register as soon as you can so we have an accurate count for handouts, break refreshments, etc.



MASBO SPRING WORKSHOPS		
Mon, March 4	Budget Workshop in Bozeman	
Thurs, March 7	Budget Workshop in Miles City	
Fri, March 8	Budget Workshop in Billings	
Wed, March 13	Budget Workshop in Great Falls	
Thurs, March 14	Budget Basics in Great Falls	
Fri, March 15	Budget Workshop in Missoula	
Thurs, March 21	Region 1 Spring Workshop in Missoula	
Fri, March 22	Budget Basics in Missoula	
Wed, March 27	Budget Basics in Miles city	
Thurs, March 28	Region 3 & Region 6 Spring Workshop in Miles City	
Fri, March 29	Region 5 Spring Workshop in Billings	
Mon, April 1	Region 4 Spring Workshop in Butte	
Wed, April 3	Region 2 Spring Workshop in Great Falls	

ABOUT THE BUDGET WORKSHOPS . . .

The Budget Workshops are right around the corner. As in years past, we will spend a good deal of the day working with your own numbers. In preparation for those activities, <u>we recommend printing hard copies</u> of the following documents and bringing them with you to the workshop:

- Entire 2019 MAEFAIRS Budget Reports (all funds)
- Page 2 (the "Summary" page) of your <u>FY14 FY18 Budget reports</u>
- The General Fund revenue page ONLY of your <u>FY14 FY18 Trustees' Financial Summaries</u>. It's page 15 of the document for most districts, but it could be a page or two before or after on yours.
- Your <u>FY2020 Preliminary Budget Data Sheet</u>. OPI will post these on March 1. Look under the red box on the left side of the webpage. Click on the FY2020 link, then find your county, then scroll through to find your school(s). Each Budget Data Sheet is 3 pages.

If you forget to bring the documents or can't find the right info, don't panic - you can access all of it via the web on the day of the workshop. Hard copies will just expedite the process and streamline your workflow.

On the day of the workshop, don't forget to bring:

- Your laptop with fresh batteries (we'll do our best to have outlets for charging, but it is always an issue)
- The handouts listed above
- A calculator and a pen or pencil

Let us know if you have any questions. Otherwise, we look forward to seeing you in the next couple of weeks!

--Mike and Denise

MASBO Board of Directors

President Vice-President Past President Fiscal Agent Ex-Officio, MTSUIP Ex-Officio, OPI <u>Cindy Foley</u>, West Valley Schools <u>Lorie Carey</u>, Jefferson Co. High School <u>Tammy Tulberg</u>, Target Range Schools <u>Kim Aarstad</u>, East Helena Schools <u>Denise Williams</u> Kara Flath Region 1 DirectorNoreen Anderson, Hellgate K-8 SchoolRegion 2 DirectorBelinda Klick, Sun River Valley SchoolsRegion 3 DirectorCheri Nygard, Wolf Point SchoolsRegion 4 DirectorKevin Patrick, Anaconda SchoolsRegion 5 DirectorRita Huck, Huntley Project SchoolsRegion 6 DirectorJen Mettler, Baker Schools

MASBO Staff

Denise Williams, Executive Director 406-461-3659

Marie Roach, Administrative Assistant 406-461-8804

DO YOU KNOW AN OUTSTANDING SCHOOL BUSINESS OFFICIAL?

MASBO is accepting nominations for 2019 Outstanding Business Official. Co-workers, teachers, trustees, district administration, other school business officials, OPI employees, and county or state officials may nominate \underline{a} current, active MASBO member (past recipients, current officers and directors of MASBO are not eligible during their term of office).

Please submit a letter of nomination and two letters of recommendation that support the nomination. The letter of nomination should include the nominee's name, job title and school district and state the specific reasons the person is nominated, including: **1**) contributions to public education in Montana at the school, community, county, state and federal levels, **2**) contributions to civic and public organizations, and **3**) the nominee's service to students.

Nomination materials may be emailed to dwilliams@masbo.com.

NOMINATION DEADLINE IS MARCH 31, 2019.

ACCEPTING NOMINATIONS FOR MASBO VICE-PRESIDENT

The MASBO Board of Directors is now accepting nominations for Vice-President. This office is elected at large for a 2-year term beginning July 1, 2019, and shall automatically succeed to the office of President, also for a 2-year term. The office of President automatically succeeds to the office of Past-President for another 2-year term. The total time commitment for this level of leadership is 6 years.

You may nominate someone for Vice-President by doing one of the following:

- 1. Send an email to Denise at dwilliams@masbo.com, or
- 2. Nominate the person at your spring regional workshop during the MASBO business meeting, or
- 3. Nominate the person at the 2019 MASBO summer conference opening business meeting.

Note: Please visit with the person you intend to nominate so that they have a chance to consider the time commitment and discuss it with their family, superintendent and/or board before accepting the nomination.

REGION DIRECTOR ELECTIONS TO BE HELD AT SPRING REGIONAL WORKSHOPS

Elections for Region Director for the term July 1, 2019 – June 30, 2022 will be held at the Region 4 and Region 5 spring workshops. Nominations may be made:

- via email to Denise Williams or the applicable Region Director prior to the spring workshop, or
- from the floor during the business portion of the spring workshop

Note: It's a good idea to check with the person you wish to nominate to ensure they are willing and able to make a long-term commitment to serve on the MASBO board.



Contact Denise



MASBO P-CARD PURCHASES REPORT

P-Card purchases for ten months of the rebate year (April – January) totaled over **\$18.7 million** with **137** school districts and special education cooperatives participating in the program. At the same time last year, we had 128 participants with over \$16.4 million in total purchases. Click *here* to see the current year P-Card purchases report.

----OR----

SEND 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

Fax it to (312)293-5811 ---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

2019 MEMBERSHIP DIRECTORY

Click <u>here</u> to place an online order of the 2019 MASBO Membership Directory. We will mail you a hard copy which includes contact information for all MASBO members. The cost is \$10 per copy (includes shipping).

MONTANA LEGISLATIVE SESSION - 2019

MONTANA STATE LEGISLATIVE BRANCH - NEW WEBSITE

Click <u>here</u> to access the main page of the Montana Legislative Branch website, and then explore a bit to find the Legislative Automated Workflow System (<u>LAWS</u>) where you can look up and track the status of bills being considered during the session. The website also provides links to <u>live video-streaming</u> of hearings and meetings, the <u>2019 session</u> <u>calendar</u> and how to <u>find</u> and <u>email</u> your local legislator.

MT-PEC DAY of ADVOCACY - March 18

During the legislative session, MT-PEC organizes and sponsors two public education days of advocacy. We had a great turnout for the February 11 event and hope everyone can join us on **March 18** where Montana's Public School trustees and administrators come together for a day of advocacy with Montana's legislators. There will be an Education panel in the morning, luncheon with legislators at Noon, committee meetings, and a reception at MTSBA headquarters from 5:30-8:30 pm. Click *here* to sign-up.



MASBO ENDORSES THESE PROGRAMS

AMERICAN FIDELITY a different opinion	Healthcare Reform Section 125 Services Health Savings Account Services Jacob Bautista, Office Manager 877-589-2544 jacob.bautista@americanfidelity.com http://www.americanfidelity.com/home.aspx
WORKERS COMPENSATION RISK RETENTION PROGRAM	Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program Shawn Bubb, Director of Insurance Services 406-457-4500 <u>sbubb@mtsba.org</u> <u>http://www.msgia.org/home</u>
MONTANA UNIFIED SCHOOL TRUST	Health, Dental, Vision, Life and Long-Term Disability Benefits Andy Holmlund, Chief Executive Officer 406-457-4400 <u>aholmlund@ms-sf.org</u> <u>http://mustbenefits.org/</u>
Montana Schools Unemployment Insurance Program	Montana Schools Unemployment Insurance Program Theresia LeSueur, Director 406-457-4407 <u>tlesueur@mtsba.org</u> <u>http://www.mtsuip.org/</u>
MONTANA SCHOOLS PROPERTY & LIABILITY INSURANCE PLAN	Payne West, Inc. Montana Schools Property & Liability Insurance Plan Rody Holman, Program Manager 406-533-1035 <u>RHolman@paynewest.com</u> <u>http://msplip.com/</u>

IMPORTANT DATES & DEADLINES – MARCH 2019

IMI	PORTANT DATES & DEADLINES – MARC	CH 2019
MARCH 1		
FY2020 General Fund Preliminary Budget Data Sheets posted on OPI website	The Office of Public Instruction provides school districts the Preliminary Budget Data Sheet showing certified ANB, GTB subsidies, and special education funding for the following year's budget. In a legislative year, these are labeled as "Pre- Session" because funding for the At-Risk and special education components is in House Bill 2	MCA 20-9-369(a) FY2020 Preliminary Budget Data Reports FY 2020 General Fund Budget Overview Worksheet FY2020 General Fund Budget
	and not likely to be determined until the end of the session. OPI will issue Post-Session data sheets when all amounts are finalized.	<u>Worksheet</u>
CTE Data Collection March 1 through April 30	The Career and Technical Education (CTE) Spring Data Collection is an AIM collection where schools identify all 12th grade high school students who were enrolled at any point during the current 2018-2019 school year who meet the definition of a CTE Concentrator. CTE Concentrators are 12th graders who have earned three (3) or more credits in any CTE program in any combination during their years of high school.	Spring Career & Technical Education (CTE) Collection Instructions
Last day to file election resolution with the county election administrator	At least 67 days before (and within 3 days of passage of the election resolution), file the school election resolution with the county election administrator.	MCA 20-20-201(2)(a) 2019 School Election Calendar 2019 School Election Handbook
MARCH 8		
Mail ballot election plan/timetable/sample instructions must arrive at the Secretary of State's Office by this date	Election administrator sends mail ballot election plan/timetable/sample instructions to the Secretary of State's Office so that it is received by this deadline (i.e. fax, mail, or e-mail to SOS office (not post marked)). One plan must be submitted for each election. As soon as the plan (and any amendments) are approved, forward a copy of the mail ballot plan to the county election administrator.	MCA 13-19-205 Mail Ballot Written Plan, Timetable and Instructions
MARCH 10		
File monthly meal claims for NSLP reimbursement	Monthly lunch, breakfast and snack counts are due the 10 th of each month. Counts are submitted in the Montana Agreement and Payments System (MAPS) for National School Lunch Program (NSLP) reimbursement.	Montana Agreement and Payment System (<u>MAPS</u>) log in page <u>School Nutrition Programs</u> <u>Checklist</u> <u>Reimbursement rates for FY2019</u> <u>FY2019 School Nutrition Payments</u>
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 th of the previous month.	<u>E-Grants System</u> Log in to your district's account, or click on Public Access, then Vendor Payee Details

IMPORTANT DATES & DEADLINES – MARCH 2019		
MARCH 11		
County election administrator publishes notice of close of regular registration	At least 30 days prior to the election, the county election administrator publishes the notice of close of regular registration at least 3 times in the 4 weeks preceding the close of regular registration. Contact the county election administrator to coordinate the publication.	<u>MCA 13-2-301</u>
MARCH 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 ****(<u>NRD) Natural Resource Development</u>	FY2019 Payment Schedule (scrollto bottom of pageState School Payments*Redirected as per HB390**Suspended for FY2019 (SB261)***Redirected as per HB647
MARCH 25		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on April 10.	OPI State and Federal Grants Handbook
MARCH 28		L
Last day for candidates for trustee election on May 7, 2019 may file a Declaration of Intent and Oath of Candidacy	Trustee candidates file for election. A Declaration of Intent and Oath of Candidacy must be filed with the election administrator. No candidate may appear on the ballot unless the candidate files between December 14, 2017 and March 28, 2019 . The candidate for trustee must be registered to vote at the time the Oath is filed.	MCA 13-10-201 MCA 20-3-305 Declaration of Intent and Oath of Candidacy
MARCH 31		I
FY 2018 Federal audit reports due to OPI For more information, contact <u>Dan Moody</u> , 406-444-0701	 The Federal audit reports (formerly known as A-133 audits) are due to OPI by March 31, 2019, for entities that have <u>federal expenditures of \$750,000</u> or greater. This includes USDA commodities. FY 2018 "Yellow Book" audits are due to OPI by June 30, 2019, for entities with <u>total revenues</u> greater than \$500,000 and <u>federal expenditures less than \$750,000</u>. 	OMB Circular A-133 MCA 2-7-503 State of Montana Single Audit Act
	Entities that had <u>total revenues less than \$500,000</u> are required to have a Financial Review once every four years. Districts required to have a Financial Review for FY2018 must submit their report to OPI by June 30, 2019. Please remit audit reports and correspondence to	A.R.M. 2-4-410 OPI School Finance Division
	OPIAuditReports@mt.gov	website – Auditing

IMPORTANT DATES & DEADLINES – MARCH 2019

	• • • • • • • • • • • • • • • • • • • •	
MARCH 31 (continued)		1
Resolution Of Intent To	School districts that intend to impose an increase in	<u>20-9-116, MCA</u>
Increase Nonvoted Levy	a nonvoted levy in FY2020 for the purposes of	
(a.k.a. Senate Bill 307	funding the Transportation, Bus Depreciation	Senate Bill 307 (2017 regular
Resolution and Notice)	Reserve, Tuition, Adult Education, and/or Building	legislative session)
	Reserve funds, shall adopt a resolution and provide notice no later March 31, 2019.	Instructions for Resolution for FY2020 Budgets
	<u>Resolution requirements</u> : At a minimum, the resolution must show the estimated number of increased or decreased mills to be imposed and the estimated increased or decreased revenue to be raised compared to nonvoted levies in the Transportation, Bus Depreciation, Tuition, Adult Education and/or Building Reserve funds imposed in the current school fiscal year and, based on the district's taxable valuation most recently certified by the department of revenue under 15-10-202, the estimated impacts of the increase or decrease on a home valued at \$100,000 and a home valued at \$200,000.	Resolution Spreadsheet for FY2020 Budgets
	<u>Notice requirements:</u> Publish a copy of the resolution in a newspaper that will give notice to the largest number of people of the district as determined by the trustees and post a copy of the resolution to the school district's website.	
	Additional requirements for Building Reserve permissive levy : Identify and list the anticipated school major maintenance projects for which the proceeds of the levy will be used in the resolution. Note: Proceeds from the levy may be expended only for the purposes in 20-9-525(2), MCA.	20-9-502 (3)(a)(i)(A), MCA 20-9-525 (2),MCA 2008 School Facility Condition Inventory Reports [contact Kara Flath for assistance]

SCHOOL ELECTION REMINDERS

SCHOOL ELECTIONS

The regular school election day is **May 7, 2019**. Click <u>here</u> to see the School Election Calendar, which has been updated to reflect the various deadlines. The calendar also shows the forms related to each task. Some items to note:

- > Don't forget to give a copy of your election resolution to the county election administrator.
- Make sure the county election administrator has your contact name, phone and email address.
- If you're running a mail ballot election, make sure the Secretary of State's office receives your election plan/timeline/sample instructions by Friday, March 8.
- Contact your county election administrator to ensure that the notice of close of regular registration will be published as required by law (13-2-301, MCA).
- Last day for a candidate to withdraw from the election is <u>April 4</u> (must send a statement of withdrawal to the election administrator).
- Deadline for a write-in candidate to file a Declaration of Intent is <u>April 4</u>. The form must be filed with the **district clerk**, regardless of who is running the election.
- The <u>School Election Handbook</u> and many forms used in school elections are posted on the OPI website. Click <u>here</u> to see the Elections Resources page.

DID YOU KNOW . . .

**** FY 2020 Indirect Cost Rate Applications** are now available. First, read the letter from Paul Taylor (click <u>here</u>), then go on to the <u>Instructions</u> for more information on how to complete your application.

The **FY 2019 Small, Rural School Achievement (SRSA) grant application is now open in Grants.gov. SRSA-eligible local educational agencies (LEAs) have until **April 26, 2019**, at 11:59 p.m. Eastern Time to submit an SRSA application. For more information, see the <u>February 2019 OPI Summary of Activities</u>, page 10.

**On March 8 at 10:00 a.m., the OPI School Finance Division will be hosting an interactive webinar event on Data Sheets and Permissive Levy Notices. They will be discussing the use of Data Sheets in budget preparation, timelines, and guidelines for Permissive Levy Notices. To register for this event, e-mail Debbie Casey at <u>dcasey@mt.gov</u> by March 6. Debbie will send you the information to attend the meeting when you register.

**Here's something to share with your trustees: <u>TRS Information for School Board Members</u> is designed to help your trustees understand the importance of the role TRS plays in recruiting and retaining qualified teachers and administrators.

****Montana REAL ID:** Starting January 2019 Montana began issuing REAL ID drivers licenses and ID cards. You are not required to get a Montana REAL ID compliant license or ID; however, a Montana REAL ID compliant license or ID or another acceptable form of identification is required to fly domestically and access federal facilities by October 2020. Alternative options, such as a passport or passport card, are acceptable forms of identification as well. To learn more about Montana REAL ID, click <u>here</u>.



Things you can control:
1. Your beliefs
2. Your attitude
3. Your thoughts
4. Your perspective
5. How honest you are
6. Who your friends are
7. What books you read
8. How often you exercise
9. The type of food you eat
10. How many risks you take
11. How you interpret situations
12. How kind you are to others
13. How kind you are to yourself
14. How often you say "I love you"
15. How often you say "thank you"
16. How you express your feelings
17. Whether or not you ask for help
18. How often you practice gratitude
19. How many times you smile today
20. The amount of effort you put forth
 How you spend/invest your money How much time you spend worrying
23. How often you think about your past
 Whether or not you try again after a setback How much you appreciate the things you have
BY RUBEN CHAVEZ // THINKGROWPROSPER

HANDY RESOURCES

2019 EMPLOYER'S TAX GUIDE

Click <u>here</u> to see Internal Revenue Service **Publication 15 (Circular E) Employer's Tax Guide for 2019**. This publication explains your tax responsibilities as an employer, including the 2019 withholding tables.

FMLA EMPLOYER GUIDE

Click here to see the U.S. Department of Labor Wage and Hour website, which includes a link to download the *Employer's Guide to the Family and Medical Leave Act*. This publication is designed to provide essential information about the FMLA, including information about employers' obligations under the law and the options available to employers in administering leave under the FMLA. The Guide is organized to correspond to the order of events from an employee's leave request to restoration of the employee to the same or equivalent job at the end of the employee's FMLA leave.

MASBO EXHIBITOR MEMBERS			
American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA <u>sfreese@azworld.com</u>	Edie Barnard Edie.barnard56@gmail.com	
Black Mountain Software	Bruco, Inc.	C & C School Accounting	
Teresa Van Buren	Adam Uselman, V.PC.O.O.	David Bardwell	
teresav@blackmountainsoftware.com	adambruco@gmail.com	<u>Help@CandCSchoolAccounting.com</u>	
D.A. Davidson & Co.	Fellon Insurance Services	Frontline Technologies	
Bridget Ekstrom	Dale Fellon	Peter Lane	
Bekstrom@dadco.com	<u>fellonins@msn.com</u>	<u>plane@frontlineed.com</u>	
Horace Mann Keith Jorgensen <u>keith.jorgensen@horacemann.com</u>	Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com	Insurance Management Services of Montana John R Boyer john@imsvest.com	
Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com	Klimas Financial Services, Inc. Charles Klimas <u>cklimas@gwnsecurities.com</u>	Montana Public Employees Retirement Administration Jenny Weigand jweigand@mt.gov	
MSGIA-WCRRP Shawn Bubb <u>sbubb@mstba.org</u>	Montana Schools Unemployment Insurance Program (MTSUIP) Theresia LeSueur <u>tlesueur@mtsba.com</u>	Montana Unified School Trust (MUST) Andy Holmlund <u>aholmlund@ms-sf.org</u>	
National IPA and TCPN	New Hope Technology Foundation	Payne West, Inc./MSPLIP	
Shelley Andrews	John Hughes	Rody Holman	
shelley.andrews@nationalipa.org	john@newhopetech.org	<u>RHolman@paynewest.com</u>	
Pine Cove Consulting	Schoolhouse IT	Southwest MT School Services	
Brandan Bassett	Jeffrey Patterson	Thomas Franta	
bbassett@pinecc.com	jeffp@schoolhouseit.com	<u>tfranta@swmss.coop</u>	
Stifel Nicolaus	Tandy Enterprises	TimeClock Plus	
Bryan Stelmack	Donna M. Tandy	James Baker	
<u>yroybal@stifel.com</u>	donnatandy77@gmail.com	sales@timeclockplus.com	
Tyler Technologies Carrie Hughes <u>carrie.hughes@tylertech.com</u>	U.S. Omni 403(b) Retirement Savings Plan Administration Ryan Phillips rphillips@omni403b.com	VALIC Michael Hart <u>michael.hart@valic.com</u>	
Todd Watkins Consulting Services	Felt, Martin, Frazier & Weldon, PC	Wipfli LLP	
Todd Watkins	Jeffrey Weldon	Kim Dare, CPA	
<u>Toddwatkinsconsulting101@gmail.com</u>	JWeldon@feltmartinlaw.com	<u>kdare@wipfli.com</u>	

Immunizations are an important safeguard for your child's health



Stick to the schedule!

Next to safe drinking water, immunizations have been called the most important public health intervention in history. Immunizations have saved millions of lives from diseases that used to be a serious threat to children.

Following a regular vaccination schedule to immunize your child can protect them and others from diseases including:

- Diphtheria
- Hepatitis A
- Hepatitis B
- Hib disease (Haemophilus influenza type b)
- Influenza (Flu)
- Measles

- Mumps
- Pertussis (Whooping Cough)
- Pneumococcal Disease
- Polio
- Rubella (German Measles)
- Tetanus (Lockjaw)
- Varicella (Chickenpox)









BlueCross BlueShield of Montana

> Source: Centers for Disease Control and Prevention

Follow us @MUSTbenefits

mustbenefits.org

bcbsmt.com