

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

February 2023

Happy February everyone! As we head into the second month of the year, I want to encourage our members to schedule in a few of the fantastic trainings enclosed in this newsletter. If you have topics of interest you'd like us to include in upcoming newsletters or trainings, please feel free to let us know. Hope to see you soon! -Shelley

Payroll Workshops are Now Open for Registration

You asked for it and we are bringing it to you! Payroll training is something we all could use more of. Our fantastic MASBO committee members, Bridgette Clark, Jane Knudsen, Ginger Martello, Laurie Kvamme, Carrie Ruff, and Jodi Williams are teaming up with our MASBO partners to bring you two full days of payroll topics.

Monday, February 20th- Day 1 will be held in person in Helena Montana at the MTSBA building with a virtual option for those who are unable to travel to attend. In person registration includes lunch and will cost \$100. Virtual attendee cost is \$80. Recordings will be available for all attendees. A block of rooms has been created at Home2 Suites and the Helena Great Northern Hotel. Details available on the workshop registration.

Thursday, February 23rd- Day 2 will be webinar only, and cost \$80. **To register, please go to the MASBO [website](#).** **Agenda's are listed below.**

Day 1 [Agenda](#)

Thank you to all our amazing MASBO Partner's for joining us for this training.

Day 2 Agenda

8:30-9:30am
9:40-10:40am
10:50-11:50am
1:00-2:00pm
2:10-3:10pm

Topics:

PERS - Enrollment and Final Payouts
TRS - Enrollments and Final Payout
MSGIA - Workers Compensation
MTSUIP - Unemployment
K12 Montana Inc - Payroll Security

MASBO Board of Directors

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406-461-3659

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406-461-8804

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Interim Services/Trainer
406-431-0124

2023 MTSBA/MASBO School Finance and Budget Virtual Symposium Agenda

Sponsored by MTSUIP - No fee to attend

Tuesdays, March 7, 21, and 28, 2023

Please join us as we partner with MTSBA to provide you important budget information. This program is a fantastic way for Business Managers to share a training with other school administrators and Board members on the everchanging face of school finance. We find that a shared training provides a great avenue for continued communication moving forward into the next budgeting year.

- **Session 1:** We will provide an overview of the history of school finance in Montana and the advancements in funding Montana's public schools over several legislative sessions. We will also provide a preview of what is expected in the 2023 Legislative Session.
- **Session 2:** The focus of this session will be on the budgeting process, including an overview of the budgeted and non-budgeted funds, the use of the funds, and restrictions on the same. This session will also include a discussion between budget authority and cash as well as information on allowable reserves, use of the General Fund, and ongoing appropriate uses of federal COVID funds.
- **Session 3:** This session will focus on the innovations that enhance personalized opportunities for our students as well as flexibilities and efficiencies to maximize district resources.

To register please go to the MTSBA [website](#). If you are not a MTSBA member, please reach out MTSBA for a guest registration. communications@mtsba.org

MASBO Minutes with Steve

Are you a new member and have questions about the newsletter but aren't sure where to turn? Steve Hamel will be hosting a webinar on February 9th at 9:00am to discuss items within the newsletter or help new members with any questions they may have. Click [here](#) to join.

Free Zoom Training, Monday February 6th at 1 pm. First Class Campaign Finance Activity Requirements

Please join us Monday afternoon. Scott Cook, Compliance Specialist with the Office of the Commissioner of Political Practices will be presenting information on compliance requirements for first class districts. Here is the Zoom [link](#). This information only applies to first class districts but may be good for those districts who are may be required to move up to first class in the future. A link to a document outlining the first class districts is [here](#).

Calculating the District Fund Budget Webinar Series

IT'S NOT TOO LATE TO JOIN!

ALL THOSE WHO JOIN WILL RECEIVE LINKS TO PRIOR RECORDINGS.

**January 18 – March 8, 2023, 1:00pm - 3:00pm
Sixteen Hours of Training in Eight 2-hour training webinars**

Gwyn Andersen and Betty Brumwell will present budget workshops that will begin with the calculation of ANB and how that drives your general fund budget, all the way through the required Notice of Increase in Non-Voted Levies. You will learn to calculate the general fund budget using your district's information, utilizing various OPI tools.

The instruction will be offered on ZOOM in eight – 2-hour segments beginning on Wednesday, January 18 and ending on Wednesday, March 8. The first session be an overview of all funds, their purpose, revenues and appropriate expenditures and each session will build on the previous session with time allowed for questions. Betty and Gwyn will also be available between sessions for discussion about the specifics or your district or questions that might arise.

Registration is for all 16 hours of training/8 webinars with no partial registration options:

\$200 for one attendee to attend any/all webinars for 8 weeks

\$300 for any/all members of your district to attend any/all 8 weeks - (Marie will get a list of your district attendee emails from the first registered attendee)

Registered attendees will receive zoom link(s) prior to webinars.

AGENDA:

Week 1 – January 18

Overview of All Funds (purpose, revenue, valid expenditures, reserve)

Week 2 – January 25

ANB (Average Number Belonging)
Separate Budget Units
Basic Entitlement and PER-ANB Entitlement

Week 3 – February 1

Additional Funding Components
Quality Educator, Indian Education for All, At-Risk Student, Data for Achievement, & Achievement Gap
Special Education Funding (including Maintenance of Effort)

Week 4 – February 8

Establishing the Base and Maximum General Fund Budget and voting limits

Week 5 – February 15

Funding the General Fund Budget
Non Levy Revenues and Guaranteed Tax Base Aid (GTB)
Operating Reserve and Excess Reserves
Budget Authority and Voter Approval
Distribution of State Aid

Week 6 – February 22

Levies & Calculating General Fund Levies
OPI General Fund Budget Spreadsheet, "The Silver Bullet"
Guest Appearance, Paul Taylor, OPI

Week 7 – March 1

Review Preliminary Budget Data Sheets
Expenditure Budgets
Budget Amendments

Week 8 – March 8

Other Budgeted Funds and their Respective Levies
Estimating & Noticing of Tax Impact of School District Levies

MASBO TECH CORNER

This year, we will periodically include this new *Tech Corner* feature in the newsletter.

Jeff Patterson and his team at K12 Montana (k12mt.com) want to get a word of warning out: **Montana clerks are being targeted** by a very sophisticated attack that steals employees' paychecks! Through electronic communications and social engineering, **attackers have been** successfully tricking clerks across the state and **stealing employee's paychecks!**

Please [read this short article](#) to **make sure your district isn't the next victim of this crime.**

P-CARD NEWS-----



MASBO P-CARD PURCHASES REPORT

P-Card purchases for six months of the current rebate year (April - December) totaled over **\$28,937,120** with **181** school districts and special education cooperatives participating in the program. At the same time last year, we had 171 participants with just over \$27 million in total purchases. Click [here](#) to see the current year P-Card purchases report.

Need Help? Contact Holly Wallace at **1-815-793-4655** or hwallace@iasbo.org for help or to schedule a webinar on helpful topics.

MASBO MEMBER PROFILES

New custom fields for County, District Enrollment and MHSA Class Size have been added! To assist with negotiations, we also have both salary and benefit fields. Please note that these two fields are hidden and only accessible for salary survey use by MASBO staff.

We'd appreciate everyone updating their profiles this month:

Log in to MASBO.com

Your username is your email address

Don't remember your password? Please try the password reset option

Go to your [Profile page](#), then select the [Custom tab](#) to add and update, that's it!

MEMBER SEARCH

Do you need to find another MASBO Member? We've enhanced this search feature for you:

Under the Membership Tab, select Member Search

You can now search by School, Software, County, Last Name or Zip

Email Marie if you need any assistance: mroach@masbo.com



Legislative Updates

The MASBO membership has been fantastic at reaching out to legislators regarding recent bill movements. We appreciate your continued willingness to share testimony. We always encourage you to share your concerns and suggestions at any time. We will continue to post legislative updates on the [website](#) but may move to a daily email as the session progresses.

The easiest way to provide testimony, without having to attend in person, is to use the [Legislative Online messaging system](#). Be sure to use the drop downs to address certain bills, legislators or committees. For more assistance, feel free to reach out. As always, please be sure to keep the discussion simple, clear and concise.

Another great opportunity to share information with the public is the [Great Works Publication](#).

Mark Your Calendar for the Spring Regional Meetings

Region 1: April 3rd, Missoula Courtyard
Region 2: April 4th, Great Falls Holiday Inn
Region 3 & 6: April 13th, Sleep Inn & Suites
Region 4: March 31st, Butte Copper King
Region 5: April 5th, Billings Hotel

2023 Summer Conference Sleeping Rooms



Fairmont Hot Springs the week of June 12-16



Do you have a sleeping room you won't need after all?

Please email Marie at mroach@masbo.com

MASBO has a waiting list and we would like to get any extra room(s) assigned to our members.

IRS MILEAGE REIMBURSEMENT RATE CHANGES FOR 2023

Beginning January 1st, 2023, the mileage reimbursement rate will be raised to 65.5 cents per mile, and 14 cents per mile for mileage driven for charitable organizations. Official information regarding this rate change can be found on the IRS [website](#).

UPCOMING OPPORTUNITIES & NEWS FROM OPI AND OTHER MASBO PARTNERS

Spring Count Day- February 6th

Spring Count is February 6th! If you were unable to attend any of the OPI webinars, please check out the [instructions](#) posted on the OPI website. The AIM unit is running a test of the Data Validation and Certification process for the Spring ANB count. Districts need to certify their Spring ANB counts in AIM before importing their data into MAEFAIRS. This means that if you find an error, you will need to work with AIM to back out the certification prior to MAEFAIRS. Validation instructions are [here](#). For help, please call the AIM Help Desk at 1-877-424-6681.

Elections Check-In Webinars

Don't miss out! Nicole Thuotte, OPI will be providing additional election check-ins leading up to Election Day. Bi-weekly meetings will begin January 13th. At these webinars, Nicole will hit on pertinent topics and allot time for questions and answers. Please check the OPI website for more information.



Election Webinars FY 2023 Elections



Day/Date	Time	Topic
Friday, Dec 16, 2022	10:00 AM	Candidates and Legislative Updates
Friday, Jan 13, 2023	10:00 AM	Preparing for an Election
Friday, Jan 27, 2023	10:00 AM	Election Accessibility
Friday, Feb 10, 2023	10:00 AM	Election Resolutions
Friday, Feb 24, 2023	10:00 AM	Mail Ballot Plans
Friday, Mar 10, 2023	10:00 AM	Election Notices
Friday, Mar 24, 2023	10:00 AM	Ballot Certification
*Thursday, Apr 6, 2023	10:00 AM	Mailing Ballots/Signature Verification
Friday, Apr 21, 2023	10:00 AM	Preparing for the Election
Friday, May 5, 2023	10:00 AM	Post-Election Procedures
Friday, May 19, 2023	10:00 AM	Election Wrap-Up

ESSER NEWS

OPI will be hosting February's **Virtual ESSER Guidance Sessions** on Thursday, February 16th & Friday, February 17th. All sessions will be recorded and posted on the [OPI ESSER Webpage](#). More information and updates will be sent out by OPI as they get closer to the sessions.

STATE BASE LIMIT INCREASE PAYMENTS

HB630 Additional Financial Support Payments for FY2023 were made on January 27th, 2023. The Payments for FY2023 are posted at the following link: [State-BASE Limit Increase Payment \(FY2023\)](#)

Accounting codes:

Revenue Source: 15 Miscellaneous Fund 3780 State - BASE Limit Increase Payment

Expenditure: 15 Miscellaneous Fund Program Code 378

If you have questions regarding payments, please contact Becky Belling (406) 444-2561.

[ESSER Monthly School Reports](#)

OPI ESSER AFTERSCHOOL AND SUMMER ENRICHMENT GRANTS

The **Afterschool** and **Summer Enrichment grants** for School Year 2022-23 will be reopening this fall under the updated name **ESSER Extended and Expanded Learning Opportunity (EELO)**. These grants will focus on Math and Reading programming efforts, combined with best practices promoting Social/Emotional Learning. To help prepare for these grants, we encourage applicants to actively explore local partnerships to best leverage these funds and improve student outcomes. View our site [HERE](#) for more information.

FY 2023 REAP Master Eligibility Spreadsheet now available for review

An updated version of the FY 2023 REAP Master Eligibility Spreadsheet (MES) is now available for your review. This version of the MES is updated as of 1/23/2023 and includes SEA-submitted State-derived poverty data and requested changes. The FY 2023 will also be posted on the [REAP website](#) and shared with **eligible LEAs** for review. We will ask LEAs to work with their RLIS State Coordinators if there is a need to update any of the information. We encourage you to also reach out to LEAs in your State to verify the accuracy of this data

FY 2023 Semester 1 Transportation Reimbursement Claims

By **February 15th** school districts must electronically enter and submit Bus Route Reimbursement Claims (TR6) and Individual Contract Reimbursement Claims (TR5) in the Pupil Transportation System.

As a result of new programming for the TR6 Bus Route Reimbursement Claims, please be very careful and pay close attention when entering reimbursement claims and not create duplicated claims. School districts will receive state and county transportation reimbursement based on actual days for all routes operated for transporting eligible riders from home to school. (20-10-145, MCA).

Individual transportation contract claims will be reimbursed for each day of school attendance for the student and for actual miles transported. Once the school district has submitted reimbursement claims, a signed copy by the board chair must be sent to the county superintendent. The state transportation reimbursements for first semester will be made with the March 2022 payment.

If you have questions or require assistance entering and submitting the first semester transportation reimbursement claims, please contact [Donell Rosenthal](#) at (406) 461-9316.

IEFA GRANT FUNDING AVAILABLE

(information from the OPI December Compass)

The Indian Education for All Unit will be offering grant awards to districts that would like to compensate their staff for completing IEFA PD modules or facilitate an exchange program between Native and Non-Native schools and students. Exchanges between schools on different reservations will be considered as well. The PD modules would be specific to the Essential Understandings Regarding Montana Indians or the IEFA Implementation Framework hub course. Grant awards would be determined based on the size of the school district and the estimated number of staff participating. Districts would also be required to provide some IEFA ANB funds for match. Interested schools and districts should contact Jennifer Stadum or Zach Hawkins in the OPI IEFA office.

Jennifer Stadum: jstadum@mt.gov or 444-0725 Zach Hawkins: zachariah.hawkins@mt.gov or 444-0708

New School Finance Calendar

The calendar link on the School Finance website has been updated for FY2023. The link will take you to the GEMS Data Reporting Calendar which is populated with important dates and deadlines that happen throughout the fiscal year. It is sortable by month and can be saved into other workable formats like Microsoft Word or Excel. You can find it here [OPI \(GEMS\) Data Collections Calendar](#) We hope this tool will help education staff across the state.



DPHHS is excited to announce that we are partnering with Medify Air and Grainger to offer **free HEPA air purifiers to Montana K-12 schools** through June 2023. Medify Air is a top-rated air purifier manufacturer that provides high quality HEPA air purifier systems and replacement filters. Grainger is a government contractor that has an established partnership with DPHHS to offer a variety of services. DPHHS is utilizing ELC School Reopening federal funds to support this partnership with the focus of improving indoor air quality in schools. In addition to reducing the transmission risk of COVID-19

and other communicable diseases, these HEPA air purifier systems will provide an added benefit of helping schools maintain clean air during wildfire smoke events.

How it Works

In the coming weeks and months, school administrators (primarily district superintendents) will be contacted by a Medify Air or Grainger representative.

- A brief survey and order form must be completed indicating the desired number of HEPA systems needed in each school. This information will be submitted directly to Grainger and Medify.
 - The Medify Air or Grainger representative can help administrators determine the number and size of HEPA systems needed in each school. There are a variety of HEPA systems for different size rooms ranging from 165 square feet to 1,875 square feet.
 - Up to three years' worth of replacement HEPA filters for each HEPA system will be included with the initial order.
- Medify Air will ship the requested HEPA systems directly to schools and submit invoices to DPHHS.
 - Prior to shipment, DPHHS will work with Grainger and Medify to review and approve orders. If DPHHS has any questions or concerns regarding order details, they may contact the school or district administrator.
 - Educational material and set-up services will be provided by Medify Air and/or Grainger upon request. For this additional support, you will simply contact the Medify Air or Grainger representative who initially contacted your school. Basic set-up information is include with each individual HEPA system.
 - HEPA systems will be available on a first come first serve basis, as funding permits.

School/school districts **do not need to apply** for ELC funding to obtain HEPA systems through this Medify Air partnership. There are **no** reporting requirements attached to this opportunity, though DPHHS may work with Grainger and Medify Air to ask follow-up questions regarding the use of the HEPA systems in schools.

Please send questions regarding this opportunity to schoolhealth@mt.gov.

OPI Indirect Cost Rate Applications for FY24 Now Available

OPI has released the FY24 applications forms for indirect cost rate certification. These forms are due by April 30th. Information regarding this can be found on the OPI [website](#).

[OPI School Finance February Compass Link](#)

MASBO ENDORSES THESE PROGRAMS

 <p>AMERICAN FIDELITY a different opinion</p>	<p>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</p>
 <p>MSGIA WORKERS COMPENSATION RISK RETENTION PROGRAM</p>	<p>Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program Shawn Bubb, Director of Insurance Services 406-457-4500 sbubb@mtsba.org http://www.msgia.org/home</p>
 <p>must MONTANA UNIFIED SCHOOL TRUST</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>MT\$UIP Montana Schools Unemployment Insurance Program</p>	<p>Montana Schools Unemployment Insurance Program Lisa Gowen 406-457-4407 lgowen@mtsba.com http://www.mtsuip.org/</p>
 <p>MONTANA SCHOOLS PROPERTY & LIABILITY INSURANCE PLAN</p>	<p>Payne West, Inc. Montana Schools Property & Liability Insurance Plan Rody Holman, Program Manager 406-533-1035 RHolman@paynewest.com http://msplip.com/</p>

MASBO EXHIBITOR MEMBERS

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Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com	Bruco, Inc. Adam Uselman, V.P.-C.O.O. adamu@bruco.com	C & C School Accounting David Bardwell Help@CandCSchoolAccounting.com
D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	Fatbeam Graham Taylor graham@fatbeam.com	Felt Martin, PC Jeffrey Weldon JWeldon@feltmartinlaw.com
Fisher's Technology Amanda Byrne info@fisherstech.com	Gwyn Andersen Consulting Gwyn Andersen gwynma@gmail.com	Horace Mann Aaron Moyer association.relations@horacemann.com
Iconergy Carl Hurst churst@iconergyco.com	Infinite Campus Bob Gits robert.gits@InfiniteCampus.com	Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com
K12 Montana Jeffrey Patterson jeffp@k12mt.com	Kalmbach Consulting Cathy Kalmbach cathymkal@gmail.com	Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com
Montana Digital Academy Sarah Marker sarah.marker@montanadigitalacademy.org	Montana Public Employees Retirement Administration Terry Dalton tdalton@mt.gov	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org
Montana Schools Unemployment Insurance Program (MTSUIP) Lisa Gowen lgowen@mtsba.com	Montana Unified School Trust (MUST) Andy Holmlund aholmlund@ms-sf.org	Payne West, Inc./MSPLIP Rody Holman RHolman@paynewest.com
Pine Cove Consulting Brandan Bassett bbassett@pineecc.com	School Services of Montana Melissa Tovaas mtovaas@mt-schools.org	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com
Wipfli LLP Kim Dare, CPA kdare@wipfli.com		

IMPORTANT DATES & DEADLINES – FEBRUARY 2023

FEBRUARY 6

Spring Enrollment Count Date	<p>The official count day for the 2023 Spring Enrollment & Aggregate Hours Collection begins Monday, February 6. Districts will report spring count date aggregate hours for all students enrolled on 2/6/2023, or the first school day that follows the count date if the official count date is not a school day.</p> <p>After verifying student enrollment and aggregate hours in AIM, submit the data to MAEFAIRS. MAEFAIRS Student Count for ANB must be submitted no later than Friday, Feb 10th, 2023.</p> <p>Extenuating circumstances for students who will be gone 10 days prior to the count date, but which would support a variance should be submitted to the OPI prior to the official enrollment count date for consideration of inclusion of the student in the enrollment count for ANB purposes beyond the 10th day of absence.</p>	<p>A.R.M. 10.20.102 Reporting Instructions Fall Enrollment, Aggregate Hours & Count Date Absence Collection</p> <p>AIM Spring Count User Guide</p> <p>AIM Data Collection Schedule</p> <p>A.R.M. 10.20.102(11)</p> <p>Submit an AIM Help Desk Ticket</p> <p>or call 1-877-424-6681 or 406-444-3800</p>
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FEBRUARY 10

File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due the 10th of each month. Counts are submitted in the Montana Agreement and Payments System (MAPS) for National School Lunch Program (NSLP) or Seamless Summer Option (SSO) reimbursement.</p> <p>See OPI's Back to School Page for more information on SSO and important updates.</p>	<p>Montana Agreement and Payment System (MAPS) log in page School Nutrition Programs Checklist</p> <p>NSLP Reimbursement rates for FY2023</p> <p>SSO Reimbursement rates</p> <p>FY2023 School Nutrition Payments</p>
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FEBRUARY 10 (continued)

OPI pays grant cash requests	<p>OPI pays grant cash requests submitted by the 25th of the previous month.</p>	<p>E-Grants System</p> <p>Log in to your district's account, or click on Public Access, then Vendor Payee Details</p>
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FEBRUARY 15

First Semester Transportation Claims due	<p>Submit first semester transportation claims online to the Superintendent of Public Instruction and transmit one copy of each claim to the County Superintendent of Schools.</p> <ul style="list-style-type: none"> • TR-5 Claim for State Reimbursement for Individual and Isolated Transportation • TR-6 Claim for Reimbursement for School Bus Transportation 	<p>MCA 20-10-145(2)</p> <p>A.R.M. 10-7-104(1)(a)</p> <p>Regulations & Guidelines for Pupil Transportation Reporting</p>
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FEBRUARY 21		
Trustees call for an election	At least 70 days prior to Election Day (May 2, 2023), the trustees must pass a resolution stating: 1) the date of the election; 2) the purpose of the election; 3) whether the election will be by mail or poll; 4) the voting locations and boundaries for each location, if there are multiple locations within a district (if changed from a previous school election the new locations must be specifically noted); and 5) the time the polls will open, if before noon.	MCA 20-20-201 MCA 20-20-203 School Election Calendar 2023 2023 School Election Handbook (see page 6) Trustees Resolution Calling for an Election
FEBRUARY 22		
County Superintendent electronically authorizes first semester transportation claims	County Superintendent electronically authorizes first semester transportation claims (consisting of one copy of each district claim).	MCA 20-10-145(2) A.R.M. 10-7-104(1)(b)
FEBRUARY 23		
OPI makes K-12 BASE aid payments	Direct State Aid Quality Educator Component At Risk Student Component Indian Education for All Student Achievement Gap Data for Achievement (SPED) State Special Education Payments	FY2023 Schedule (scroll to bottom of page)
FEBRUARY 24		
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) School Election Calendar 2023 2023 School Election Handbook
FEBRUARY 25		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on March 10.	OPI State and Federal Grants Handbook

IMPORTANT DATES & DEADLINES – MARCH 2023

MARCH 1		
FY2024 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.	MCA 20-9-369(a) FY2024 Preliminary Budget Data Reports (find your county ; then your district(s)) FY 2024 General Fund Budget Overview FY2024 General Fund Budget Spreadsheet

IMPORTANT DATES & DEADLINES – MARCH 2023

MARCH 3

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 School Election Calendar 2023 2023 School Election Handbook
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MARCH 6

County election administrator publishes notice of close of regular registration	<p>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.</p> <p>Contact the county election administrator to coordinate the publication.</p>	MCA 13-2-301 School Election Calendar 2023
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MARCH 10

File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due the 10th of each month. Counts are submitted in the Montana Agreement and Payments System (MAPS) for National School Lunch Program (NSLP) or Seamless Summer Option (SSO) reimbursement.</p> <p>See OPI's Back to School Page for more information on SSO and important updates.</p>	<p>Montana Agreement and Payment System (MAPS) log in page School Nutrition Programs Checklist</p> <p>NSLP Reimbursement rates for FY2023</p> <p>SSO Reimbursement rates</p> <p>FY2023 School Nutrition Payments</p>
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OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 th of the previous month.	E-Grants System Log in to your district's account, or click on Public Access, then Vendor Payee Details
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MARCH 23

Last day for candidates for trustee election on May 2, 2023 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 8, 2022 and March 23, 2023 . 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 School Election Calendar 2023 2023 School Election Handbook
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IMPORTANT DATES & DEADLINES – MARCH 2023

MARCH 24

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
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MARCH 28

OPI makes K-12 BASE aid payments	Direct State Aid Quality Educator Component At Risk Student Component Indian Education for All Student Achievement Gap Data for Achievement (SPED) State Special Education Payments Transportation	FY2023 Schedule (scroll to bottom of page)
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MARCH 30

Last day trustee candidates can withdraw from the election.	Any candidate who has already filed for election, but wishes to withdraw their name, may do so by sending a statement of withdrawal to the election administrator by 5:00 p.m. on March 30 th .	MCA 20-3-305 (3)(a)
Deadline for write-in candidate for a trustee position on a school board to file a Declaration of Intent	A person seeking to become a write-in candidate for a trustee position shall file a declaration of intent no later than 5 p.m. on the day before the ballot certification deadline in 20-20-401 (not less than 30 days before election day).	MCA 20-3-305 (2)(b) Declaration of Intent and Oath of Candidacy for Write-In Candidates

MARCH 31

Notify election judges of appointment	At least 30 days prior to election day, appoint three or more election judges for each precinct, one of whom must be designated chief judge.	MCA 13-4-101
Election administrator certifies ballot	<p>Not less than 30 days prior to election day, the election administrator prepares the final ballot form, listing all candidates and propositions to be voted upon.</p> <p>Trustees must pass a resolution stating exact levy amounts by this date in order for the clerk to certify the ballot. This resolution must include the durational limit, if any, on the levy.</p>	MCA 20-20-401 Sample Ballots MCA 15-10-425

IMPORTANT DATES & DEADLINES – MARCH 2023

<p>Election by Acclamation and Cancellation of Election</p>	<p>If the number of candidates filing a nomination petition or filing a declaration of intent to be a write-in candidate is equal to or less than the number of open trustee positions to be elected, the trustees may cancel the trustee election and give notice that a trustee election will not be held. The trustee election may not be declared by acclamation until all candidate filing deadlines have passed. Send a copy of your election cancellation notice to the county election administrator to aid with the provisions of late registration.</p>	<p>MCA 20-3-313</p> <p>Notice of Trustee Election Cancellation</p> <p>Certificate of Trustee Election by Acclamation</p>
<p>FY 2022 Federal Single audit reports due to OPI</p> <p>For more information, contact Kristen Becker at 406-444-0701</p> <p>Please remit audit reports and correspondence to OPIAuditReports@mt.gov.</p>	<p>The Federal Single audit reports (formerly known as A-133 audits) are due to OPI by March 31, 2023, for entities that have <u>federal expenditures of \$750,000 or greater</u>. This includes USDA commodities.</p> <p>FY 2022 Non-Federal audits are due to OPI by June 30, 2023, for entities with <u>total revenues greater than \$500,000 and federal expenditures less than \$750,000</u>.</p> <p>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 FY2022 must submit their report to OPI by June 30, 2023.</p>	<p>2 CFR part 200, subpart F</p> <p>MCA 2-7-503 MCA 2-7-514</p> <p>A.R.M. 2-4-410</p> <p>OPI School Finance Division website – Auditing</p>
<p>Resolution Of Intent To Increase Nonvoted Levy</p>	<p>School districts that intend to impose an increase in a nonvoted levy in FY2024 for the purposes of funding the Transportation, Bus Depreciation Reserve, Tuition, Adult Education, Flexibility and/or Building Reserve funds, shall adopt a resolution and provide notice no later March 31, 2023.</p> <p><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 non-voted levies in the Transportation, Bus Depreciation, Tuition, Adult Education, Flexibility 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.</p> <p><u>Notice requirements:</u> Publish a copy of the resolution in a newspaper that will give notice to</p>	<p>20-9-116, MCA</p> <p>20-9-502 (3)(a)(i)(A), MCA 20-9-525 (2),MCA</p>

IMPORTANT DATES & DEADLINES – MARCH 2023

	<p>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.</p> <p>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.</p>	
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MARCH 23 – APRIL 22

<p>Post Notice of Election (Not less than 10 days, or more than 40 days before election day)</p>	<p>The election notice must be published in a newspaper of general circulation in the district if available, posted in at least three public places in the district AND posted on the district's website for the 10 days prior to the election, if the district has an active website. Notice using any other recognized media may be used to supplement the posting.</p> <p>The notice must include: 1) the date and voting locations for the election; 2) voting location hours; 3) each proposition to be considered by the electorate; 4) the number of trustee positions, if any, subject to election and the length of the terms for those positions; 5) where and how absentee ballots may be obtained; and 6) where and how late registrants may obtain a ballot on election day.</p> <ul style="list-style-type: none"> • If the polling place has changed from the previous school election, that change must be referred to in the notice. • If more than one proposition will be considered in the same district, each proposition must be set apart and identified, or placed in separate notices. 	<p>MCA 20-20-204</p> <p>School Election Notices</p> <p>School Election Calendar 2023</p> <p>2023 School Election Handbook</p>
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