

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



*Empowering School Business Leaders Through Education*

**JANUARY/FEBRUARY 2022**

## TRAINING OPPORTUNITIES

### ELECTION CHECK-IN with Nicole Thuotte

Join Nicole Thuotte and MASBO every other Friday for the school election topic of the day followed by Q & A. All meetings will be held 9:00 a.m. – 10:00 a.m. No need to register – just zoom in!

- February 11 – Preparing for an Election
- February 25 – Mail Ballot Plans
- March 11 – Voter Accessibility and General Q & A
- March 25 – Ballot Certification; Late Registration
- April 8 – Election Notices; Early Voting
- April 22 – Preparing for Election Day
- May 6 – Election Wrap Up

### MTSBA HR VIRTUAL SYMPOSIUM

MTSBA's annual HR Symposium is sponsored by MTSUIP and there is no fee to attend. The virtual trainings will be held on **Tuesdays** in **February: 8, 15 and 22** from **1:00 p.m. – 3:00 p.m.** If you're unable to attend, each session will be recorded and available to you a few days afterward. An agenda will be posted on their website soon, but you can register by clicking [here](#).

### 2022 MTSBA/MASBO SCHOOL FINANCE AND BUDGET SYMPOSIUM

The MTSBA/MASBO School Finance and Budget Symposium is sponsored by MTSUIP and there is no fee to attend. The virtual trainings will be held on **Tuesdays** in **March: 8, 15 and 22** from **1:00 p.m. – 3:00 p.m.** If you're unable to attend, each session will be recorded and available to you a few days afterward. An agenda will be posted on their website soon, but you can register by clicking [here](#).

### BUDGET WORKSHOPS

Join Mike Waterman for some in depth training on budget projections and working on your Notice of Intent to Increase Non-Voted Levies resolution and notice. Workshop dates and locations are shown below. For more information and to register, click on the link of the date you want to attend:

- [March 3 - Missoula](#)
- [March 4 - Great Falls](#)
- [March 11 - Billings](#)

### SPRING REGIONAL WORKSHOPS – **mark your calendar**

Plans for spring regional workshops are underway on the following dates and locations. Watch for an email from your region director and help them with ideas on the topics you'd like to learn more about.

Region 1: TBD

Region 2: March 28 in Great Falls

Regions 3 & 6: April 15 in Miles City

Region 4: April 7 in Anaconda

Region 5: March 30 in Billings

## MASBO Board of Directors

President	<u>Rita Huck</u> , Huntley Project	Region 1 Director	<u>Lacey Porrovecchio</u> , Bigfork
Vice-President	<u>Belinda Klick</u> , Sun River Valley	Region 2 Director	<u>Karsen Drury</u> , Cascade
Past President	<u>Lorie Carey</u> , Jefferson Co. H.S.	Region 3 Director	<u>Colleen Drury</u> , Scobey
Fiscal Agent	<u>Kim Aarstad</u> , East Helena	Region 4 Director	<u>Kevin Patrick</u> , Butte
Ex-Officio, MTSUIP	<u>Jen Mettler</u> , Baker K-12	Region 5 Director	<u>Rebekah Rhoades</u> , Lewistown
Ex-Officio, OPI	Vacant	Region 6 Director	<u>Stacy Montgomery</u> , Forsyth

## MASBO Staff

Denise Williams  
Executive Director  
406-461-3659

Marie Roach  
Association Services Coordinator  
406-461-8804

Steve Hamel  
Interim Services/Trainer  
406-431-0124

## THANK YOU, MASBO Denise Williams, Executive Director

When an outgoing past-president leaves the MASBO board, I invite them to write some “parting shots” for the newsletter. Now I get to do it. ☺

My first day as MASBO Executive Director was April 1, 2012. The photo to the right was taken at a going away party hosted by my OPI colleagues and other friends. It shows my emotions at the time (not to mention darker hair and less wrinkles). Having spent the previous 10 years working in the School Finance Division, I was sad to leave my OPI job, but super excited to be taking all that I learned there forward in my new role at MASBO.



In addition to the technical knowledge of school finance and budgeting and experience with OPI data collection processes, the OPI taught me a lot about the value of effective communication and providing great customer service. It was there that I learned you should always respond to an email or phone call within 24 hours. And I became a better writer thanks to Madalyn Quinlan and Joan Anderson. Paying close attention to their edits helped me to be a bit more succinct and sequential in my thoughts, if not improve my grammar and punctuation. The most important thing I learned is that change is inevitable, and the interaction and relationship between the OPI, school districts, county and other agencies is crucial. At OPI, we were expected to take the lead in implementing changes as efficiently and effectively as possible for all involved.

I took those values and beliefs with me to MASBO, but I can tell you our successes during my tenure have been a team effort. The **MASBO Board of Directors** put me on the road to be present at trainings because they wanted their ED to be visible. They charged me with representing school business officials in education advocacy efforts at the state level. They came up with great ideas for more training opportunities and in-person recognition of MCSBO certification at the recipient’s school board meeting. Without them and rockstar **Marie Roach** handling all the details of member services, event planning, registration, p-card applications and website maintenance, MASBO would not be what it has grown to be today. And the recent addition of **Steve Hamel** to our team gives us the ability to send someone to “save the day” for districts that need it the most. Through your questions, I’ve become much smarter. Travelling around the state has made me appreciate its diversity and the unique challenges in each region.

Your new ED has a chance to pick up the ball and move things forward. Be open to change and help this person succeed. **ATTEND THE TRAININGS**, give your region director ideas for topics, volunteer to lead a roundtable discussion, serve on a panel of experts, share a spreadsheet or other tool you’ve developed to make your job easier, become a mentor, find someone new and ask them how it’s going – reassure them and encourage them to stick with it. The best part of MASBO is the culture of its members embodied in its mission statement: **Empowering school business leaders through education**. Get involved!

See you soon ~ Denise

## REGION DIRECTOR ELECTIONS TO BE HELD AT SPRING REGIONAL WORKSHOPS

Elections for Region Director will be held at the following spring workshops:

### ➤ Region 4

- Kevin Patrick was elected to serve the current term, which ends on June 30, 2022.
- ***Need an election for director for new term: July 1, 2022 - June 30, 2025.***

### ➤ Region 5

- Rebekah Rhoades was elected to serve the current term, which ends on June 30, 2022.
- ***Need an election for director for new term: July 1, 2022 - June 30, 2025.***

Nominations may be made:

- via email to Marie Roach or the applicable Region Director prior to the spring workshop, or
- from the floor during the business portion of the spring workshop.

***Note: Please visit with the person you intend to nominate for Region Director 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.***



## P-CARD NEWS-----

### MASBO P-CARD PURCHASES REPORT

P-Card purchases for nine months of the current rebate year (April - December) totaled over **\$27.3 million** with **172** school districts and special education cooperatives participating in the program. At the same time last year, we had 163 participants with over \$21 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](mailto:hwallace@iasbo.org) for help or to schedule a webinar on helpful topics.

### ***DO YOU KNOW AN OUTSTANDING SCHOOL BUSINESS OFFICIAL?***

MASBO is accepting nominations for 2022 Outstanding Business Official. Co-workers, teachers, trustees, district administration, other school business officials, OPI employees, and county or state officials may nominate **a current, active MASBO member** (i.e., a school employee directly connected with business administration of schools in the State of Montana and FY2022 MASBO member).

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)** service in civic and public organizations, and **3)** the nominee's service to students. For complete instructions, click [here](#).

Nomination materials may be emailed to [mroach@masbo.com](mailto:mroach@masbo.com)

**NOMINATION DEADLINE IS 5:00 p.m. APRIL 29, 2022**

## MASBO ENDORSES THESE PROGRAMS

	<p>Healthcare Reform Section 125 Services Health Savings Account Services <b>Jacob Bautista</b>, Office Manager 877-589-2544 <a href="mailto:jacob.bautista@americanfidelity.com">jacob.bautista@americanfidelity.com</a> <a href="http://www.americanfidelity.com/home.aspx">http://www.americanfidelity.com/home.aspx</a></p>
	<p>Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program <b>Shawn Bubb</b>, Director of Insurance Services 406-457-4500 <a href="mailto:sbubb@mtsba.org">sbubb@mtsba.org</a> <a href="http://www.msgia.org/home">http://www.msgia.org/home</a></p>
	<p>Health, Dental, Vision, Life and Long-Term Disability Benefits <b>Andy Holmlund</b>, Chief Executive Officer 406-457-4400 <a href="mailto:aholmlund@ms-sf.org">aholmlund@ms-sf.org</a> <a href="http://mustbenefits.org/">http://mustbenefits.org/</a></p>
	<p>Montana Schools Unemployment Insurance Program <b>Theresa LeSueur</b>, Director 406-457-4407 <a href="mailto:tlesueur@mtsba.org">tlesueur@mtsba.org</a> <a href="http://www.mtsuip.org/">http://www.mtsuip.org/</a></p>
	<p>Payne West, Inc. Montana Schools Property &amp; Liability Insurance Plan <b>Rody Holman</b>, Program Manager 406-533-1035 <a href="mailto:RHolman@paynewest.com">RHolman@paynewest.com</a> <a href="http://msplip.com/">http://msplip.com/</a></p>

## IMPORTANT DATES & DEADLINES – FEBRUARY 2022

### December 9, 2021 – March 24, 2022

<p>Candidates for trustee election on May 3, 2022 may file a Declaration of Intent and Oath of Candidacy</p>	<p>Trustee candidates file for election. A Declaration of Intent and Oath of Candidacy must be filed with the election administrator. <b>No candidate may appear on the ballot unless the candidate files between <i>Thursday, December 9, 2021 and Thursday, March 24, 2022</i>.</b> The candidate for trustee must be registered to vote at the time the Oath is filed.</p> <p>County superintendents should log into the County application and complete/verify their district classification and board compositions for the 2022 school election season.</p>	<p><a href="#">Declaration of Intent and Oath of Candidacy</a></p> <p><a href="#">School Election Calendar 2022</a></p> <p><a href="#">Quick Reference Guide: County District Classification Collection</a></p>
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### FEBRUARY 7

<p>Spring Enrollment Count Date</p>	<p>The official count day for the 2022 Spring Enrollment &amp; Aggregate Hours Collection begins <b>Monday, February 7</b>. Districts will report spring count date aggregate hours for all students enrolled on 2/1/2022, 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. <b>MAEFAIRS Student Count for ANB must be submitted no later than Friday, February 11, 2022.</b></p> <p>Extenuating circumstances for students who will be gone 10 days prior to the count date, but which would support a variance <b>should be submitted to the OPI prior to the official enrollment count date</b> for consideration of inclusion of the student in the enrollment count for ANB purposes beyond the 10th day of absence.</p>	<p><a href="#">A.R.M. 10.20.102 Reporting Instructions Fall Enrollment, Aggregate Hours &amp; Count Date Absence Collection</a></p> <p><a href="#">A.R.M. 10.20.102(11)</a> OPI Contact: <a href="#">Barb Quinn</a> 444-3249</p>
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### FEBRUARY 10

<p>File monthly claims for NSLP or SSO reimbursement</p>	<p>Monthly lunch, breakfast and snack counts are due the 10<sup>th</sup> 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 <a href="#">Back to School Page</a> for more information on SSO and important updates.</p>	<p>Montana Agreement and Payment System (<a href="#">MAPS</a>) log in page</p> <p><a href="#">School Nutrition Programs Checklist</a></p> <p>NSLP <a href="#">Reimbursement rates for FY2022</a></p> <p>SSO <a href="#">Reimbursement rates FY2022 School Nutrition Payments</a></p>
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## IMPORTANT DATES & DEADLINES – FEBRUARY 2022

### FEBRUARY 10 (continued)

OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 <sup>th</sup> of the previous month.	<a href="#">E-Grants System</a> Log in to your district's account, or click on Public Access, then Vendor Payee Details
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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"> <li>• <b>TR-5</b> Claim for State Reimbursement for Individual and Isolated Transportation</li> <li>• <b>TR-6</b> Claim for Reimbursement for School Bus Transportation</li> </ul>	<a href="#">MCA 20-10-145(2)</a> <a href="#">A.R.M. 10-7-104(1)(a)</a> <a href="#">Regulations &amp; Guidelines for Pupil Transportation Reporting</a>
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### 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).	<a href="#">MCA 20-10-145(2)</a> <a href="#">A.R.M. 10-7-104(1)(b)</a>
Trustees call for an election	<p>At least 70 days prior to Election Day (May 4, 2021), the trustees must pass a resolution stating:</p> <ol style="list-style-type: none"> <li>1) the date of the election;</li> <li>2) the purpose of the election;</li> <li>3) whether the election will be by mail or poll;</li> <li>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</li> <li>5) the time the polls will open, if before noon.</li> </ol>	<a href="#">MCA 20-20-201</a> <a href="#">MCA 20-20-203</a>  <a href="#">School Election Calendar 2022</a> <a href="#">2022 School Election Handbook</a> (see page 6)

### FEBRUARY 23

OPI makes K-12 BASE aid payments	<b>Direct State Aid</b> <b>Quality Educator Component</b> <b>At Risk Student Component</b> <b>Indian Education for All</b> <b>Student Achievement Gap</b> <b>Data for Achievement</b> <b>(SPED) State Special Education Payments</b>	<a href="#">FY2022 Payment Schedule</a> (scroll to bottom of page)
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### FEBRUARY 25

Grant cash request due to OPI	Grant cash requests made by this date will be paid on March 10.	<a href="#">OPI State and Federal Grants Handbook</a>
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.	<a href="#">MCA 20-20-201(2)(a)</a> <a href="#">School Election Calendar 2022</a> <a href="#">2022 School Election Handbook</a>

## IMPORTANT DATES & DEADLINES – FEBRUARY 2022

### MARCH 1

<p>Tax forms under Sections 6055 and 6056 of the Internal Revenue Code are due (Affordable Care Act)</p>	<p><b>SECTION 6055 FORMS:</b> Insurers and employers that sponsor self-insured health plans will use IRS Forms 1094-B and 1095-B to report on individuals enrolled in minimum essential coverage.</p> <p><a href="#"><u>Form 1095-B Health Coverage</u></a> Due to “responsible individual” by <b>March 2, 2022</b></p> <p><a href="#"><u>Form 1094-B Transmittal of Health Coverage Information Returns</u></a> Due to IRS by <b>March 1, 2022</b> for the 2021 tax year (paper forms) and <b>March 31, 2022</b> (electronic forms).</p>	<p><a href="#"><u>Instructions for Forms 1094-B and 1095-B</u></a></p>
<p>An employer with 50 or more full-time employees during the prior calendar year would file Form 1095-C and Form 1094-C.</p>	<p><b>SECTION 6056 FORMS:</b> Large employers will use IRS Forms 1094-C and 1095-C to report on offers of health coverage and enrollment in employer-provided plans. Employers that sponsor self-insured plans and that are also applicable large employers will use Forms 1094-C and 1095-C to file a combined report under both section 6055 and 6056.</p> <p><a href="#"><u>Form 1095-C Employer-Provided Health Insurance Offer and Coverage</u></a> Due to employees by <b>March 2, 2022</b> for the 2021 tax year.</p> <p><a href="#"><u>Form 1094-C Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns</u></a> Due to IRS by <b>March 2, 2022</b> for the 2021 tax year (paper forms) and <b>March 31, 2021</b> (electronic forms).</p>	<p><a href="#"><u>Instructions for Forms 1094-C and 1095-C</u></a></p>

## IMPORTANT DATES & DEADLINES – MARCH 2022

### December 19, 2020 – March 24, 2021

<p>Candidates for trustee election on May 3, 2022 may file a Declaration of Intent and Oath of Candidacy</p>	<p>Trustee candidates file for election. A Declaration of Intent and Oath of Candidacy must be filed with the election administrator. <b>No candidate may appear on the ballot unless the candidate files between Thursday, December 9, 2021 and Thursday, March 24, 2022.</b> The candidate for trustee must be registered to vote at the time the Oath is filed.</p>	<p><a href="#"><u>Declaration of Intent and Oath of Candidacy</u></a></p> <p><a href="#"><u>School Election Calendar 2022</u></a></p>
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## IMPORTANT DATES & DEADLINES – MARCH 2022

### MARCH 1

FY2023 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.	<a href="#">MCA 20-9-369(a)</a>  FY2023 Preliminary Budget Data Reports ( <a href="#">find your county</a> ; then <a href="#">your district(s)</a> )  <a href="#">FY 2023 General Fund Budget Overview</a>  <a href="#">FY2023 General Fund Budget Spreadsheet</a>
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### MARCH 4

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 <b>so that it is received by this deadline</b> (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.	<a href="#">MCA 13-19-205</a> <a href="#">Mail Ballot Written Plan, Timetable and Instructions</a>  <a href="#">School Election Calendar 2022</a> <a href="#">2022 School Election Handbook</a>
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### MARCH 7

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.	<a href="#">MCA 13-2-301</a>  <a href="#">School Election Calendar 2022</a>
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### MARCH 10

File monthly claims for NSLP or SSO reimbursement	Monthly lunch, breakfast and snack counts are due the 10 <sup>th</sup> 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.  See OPI's <a href="#">Back to School Page</a> for more information on SSO and important updates.	Montana Agreement and Payment System ( <a href="#">MAPS</a> ) log in page <a href="#">School Nutrition Programs Checklist</a> NSLP <a href="#">Reimbursement rates for FY2022</a> SSO <a href="#">Reimbursement rates</a> <a href="#">FY2022 School Nutrition Payments</a>
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 <sup>th</sup> of the previous month.	<a href="#">E-Grants System</a> Log in to your district's account, or click on Public Access, then Vendor Payee Details



## IMPORTANT DATES & DEADLINES – MARCH 2022

### MARCH 24

Grant cash request due to OPI	Grant cash requests made by this date will be paid on April 10.	<a href="#">OPI State and Federal Grants Handbook</a>
Last day for candidates for trustee election on May 3, 2022 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 9, 2021 and <b>March 24, 2022</b> . The candidate for trustee must be registered to vote at the time the Oath is filed.	<a href="#">MCA 13-10-201</a> <a href="#">MCA 20-3-305</a> <a href="#">Declaration of Intent and Oath of Candidacy</a>  <a href="#">School Election Calendar 2022</a> <a href="#">2022 School Election Handbook</a>

### MARCH 28

OPI makes K-12 BASE aid payments	<b>Direct State Aid</b> <b>Quality Educator Component</b> <b>At Risk Student Component</b> <b>Indian Education for All</b> <b>Student Achievement Gap</b> <b>Data for Achievement</b> <b>(SPED) State Special Education Payments</b>	<a href="#">FY2022 Payment Schedule</a> (scroll to bottom of page)
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### MARCH 31

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 April 1.	<a href="#">MCA 20-3-305 (3)(a)</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 <a href="#">20-20-401</a> (not less than 30 days before election day).	<a href="#">MCA 20-3-305 (2)(b)</a> <a href="#">Declaration of Intent and Oath of Candidacy for Write-In Candidates</a>
FY 2021 Federal Single audit reports due to OPI  For more information, contact <a href="#">Dan Moody</a> , 406-444-0701  Please remit audit reports and correspondence to <a href="mailto:OPIAuditReports@mt.gov">OPIAuditReports@mt.gov</a> .	The Federal Single audit reports (formerly known as A-133 audits) are due to OPI by March 31, 2022, for entities that have <u>federal expenditures of \$750,000 or greater</u> . This includes USDA commodities.  FY 2021 Non-Federal audits are due to OPI by June 30, 2022, for entities with <u>total revenues greater than \$500,000 and federal expenditures less than \$750,000</u> .  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 FY2021 must submit their report to OPI by June 30, 2022.	<a href="#">2 CFR part 200, subpart F</a>  <a href="#">MCA 2-7-503</a> <a href="#">MCA 2-7-514</a>  <a href="#">A.R.M. 2-4-410</a>  <a href="#">OPI School Finance Division website – Auditing</a>

## IMPORTANT DATES & DEADLINES – MARCH 2022

**MARCH 31** (continued)

<p>Resolution of Intent to Increase Nonvoted Levy</p>	<p>School districts that intend to impose an increase on increase in a nonvoted levy in FY2023 for the purposes of funding the <b>Transportation, Bus Depreciation Reserve, Tuition, Adult Education</b> and/or <b>Flexibility</b> funds, shall adopt a resolution and provide notice no later March 31, 2022.</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 and/or Flexibility 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>Public 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.</p> <p>Additional requirements for <b>Building Reserve permissive levy:</b> Identify and list the anticipated school major maintenance projects for which the proceeds of the levy will be used in the resolution. Also list the estimated funding sources. For permissive levy, show amount and estimated mills using district's most recent taxable value. Follow the public notice requirements in 20-9-116 (2)(b), MCA.</p>	<p><a href="#">20-9-116, MCA</a></p> <p><a href="#">20-9-502 (3)(a)(i)(A), MCA</a>  <a href="#">20-9-236(a), MCA</a>  <a href="#">20-9-525 (2), MCA</a></p>
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## INTERCAP Program News

The Montana Board of Investments is modernizing the INTERCAP Loan Program to reduce costs and lower rates. What can school districts expect?

- Immediately available is the new simplified loan application to fill out and submit online. <https://investmentmt.com/INTERCAP/>
- Effective January 25, 2022:
  - BOI will be funding loans and receiving repayments directly.
  - Notices with the new repayment instructions have been mailed out in December to borrowers with loans outstanding including ACH auto debit authorization forms.
  - ACH auto debit repayment initiated by BOI will be mandatory for loans closed after January 25<sup>th</sup>.
  - New vehicle/equipment loans will no longer require collateral liens.

# Benefits You Should Offer to Attract Great Employees

by [Stephanie Thomas-Roid](#), Account Development Executive, American Fidelity 503-828-3718

In order to attract and retain great employees, it's crucial to offer a robust benefits package. From the standard health benefits every employee expects to see, to the unique perks that can really set you apart, benefits can play a major role in retention and job satisfaction. In fact, 72% of employees said having more work benefits would increase their job satisfaction, which, in turn could decrease your employee turnover.

## Standard Benefits to Ensure You're Offering

When choosing a job, benefits are one of the key deciding factors employees take into account. In fact, over half say benefits and perks are a top priority when it comes to accepting a job. Whether or not you provide certain benefits may determine a candidate's decision to apply to your company. If you want to keep up with your competition, make sure you're offering the standard benefits like major medical plans, reimbursement accounts, supplemental insurance (disability, especially), and life insurance. These offerings can help financially protect your employees' incomes and their families.

Not only should you ensure you're offering these benefits, you should also be willing to provide the flexibility your employees seek. A one-size-fits all approach to employee benefits doesn't meet the unique needs of each employee and their families. Provide the opportunity to customize coverage so your employees aren't having to pay for something they don't actually need.

Furthermore, you'll need to make benefits education and communication a priority for your organization. Employees shouldn't have to handle their enrollment alone. Without the proper education and communication strategy, your employees may be left feeling uninformed and confused on which benefits are right for them and their families. When going through enrollment, 48% of employees state that their employer did not provide them with enough educational resources to prepare them for enrollment decisions. Make sure you aren't leaving your employees high and dry when it comes to their benefits.

## Unique Benefits and Perks that Entice Employees

Besides the standard offerings, there are other unique benefits you could offer to attract better employees. Things like on-site childcare, wellness incentives or reimbursements, employee assistance programs (EAP), telehealth options and lounges for mothers can really boost employee satisfaction and engagement in the workplace.

With a greater spotlight on mental health than ever before, more and more employers are encouraged to start offering benefits aimed directly at bettering their employees' mental health. Employees need support. Nearly half (46%) of full-time workers are dealing with mental health issues<sup>4</sup> and 76% of people believe their employer should be doing more for their mental health.<sup>5</sup> More employees are looking to their employers for assistance than ever before. You can show support towards your employees by cultivating a positive work environment, providing mental health resources, and offering mental health benefits.

## Put Employee Wellbeing First

When it comes down to it, employees want an employer that places a high value on their wellbeing. Providing employees with benefits that deliver a holistic approach to their well-being can lead to higher employee engagement and greater employee retention.<sup>6</sup> If you want happier employees who are committed to your organization, make their health and wellness a top priority by offering a wide variety of benefits that can help them and their families feel protected.

<sup>1</sup> Access Perks: Employee Engagement & Loyalty Statistics-The Ultimate Collection; August 7, 2020.

<sup>2</sup> Glassdoor: The Benefits Employees Want Most; 2017; Accessed July 6, 2021.

<sup>3</sup> PlanSponsor: Employees Need More Help With Health Benefit Decisions; March 24, 2021.

<sup>4</sup> BenefitsPro: Why Wellness Should Be a Cornerstone of Your Return-To-The-Office Strategy; March 30, 2021.

<sup>5</sup> Oracle: 2020 AI@Work study: 76% of people believe their employer should be doing more to protect their mental health, August 04, 2020, p3; Accessed May 5, 2021.

<sup>6</sup> BenefitFocus Blog: Open Enrollment Communication Guide: Overcoming Analysis Paralysis; August 20, 2019.

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<b>Wipfli LLP</b> Kim Dare, CPA <a href="mailto:kdare@wipfli.com">kdare@wipfli.com</a>	<p style="text-align: center;"><i><b>Stay Humble</b></i></p> <p style="text-align: center;"><i><b>Work Hard</b></i></p> <p style="text-align: center;"><i><b>Be Kind</b></i></p>	



# Winter Sports

## TRAUMATIC BRAIN INJURY (TBI)



### **Winter sports are a marvelous way to stay in shape and have fun during the chillier months.**

Flying down the slopes on skis or a snowboard, cruising through the woods on a snowmobile, sledding down the perfect sled hill, or whacking a hockey puck into the goal is exhilarating.

These activities are good for our overall fitness and health, but it is crucial to take precautions and know the risks, especially if you hit your head and get a concussion. Head injuries can cause long-term and permanent health issues and must be taken very seriously.

**According to the U.S. Consumer Products Safety Commission, snowboarding is the leading cause of winter sports injuries.**



### **To ensure your winter adventure is safer, keep these tips in mind:**

- Always wear a helmet for high-velocity sports.
- Prepare for extreme physical activity by stretching and warming up.
- Hydrate and eat a well-balanced diet.
- Wear appropriate protective gear and outerwear to limit skin exposure.
- Know when to stop. Injuries can happen from exhaustion.
- Avoid overexposure to sub-freezing temperatures.
- Be informed about current weather conditions.
- Stay in bounds on the slopes and watch for obstacles and hazardous conditions.
- Never participate in winter sports activities alone.
- Extreme sports activities should be enjoyed where medical care is near.
- Seek medical attention if injured.



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# Share the Love

Awareness & Education to help  
save and heal more lives  
through donation.



## *Love is generosity and compassion*

We can take small steps everyday to make someone else's quality of life is better. There are many ways to give, including organ, eye, tissue, blood, platelets, and marrow.

If you become an organ donor, upon death all eligible organs will be donated. By registering to become an organ, eye and tissue donor, you could help more than **75 people** — and that's not counting the lives that those 75 people touch. If you're interested you can register **HERE** to become a donor, it will take less than a minute.

If organ donation isn't your thing, volunteering to donate blood is a quick and surprisingly powerful way to help save lives. Public health programs are in place to ensure that the national blood supply is safe and plentiful. However, of the 38% of people eligible to donate, less than 10% actually do. One donation can save up to **3 lives**. The entire blood giving process takes 10 to 12 minutes.

## *8 Things to Know about Giving Blood*

1. One donation can save up to three lives.
2. The average adult has 10 pints of blood. Roughly 1 pint is given during a donation.
3. A single car accident can require as many as 100 pints of blood.
4. Only 9% of people in the U.S. have the universal blood type O-negative, which is needed in emergencies when responders must act before a patient's blood can be typed.
5. Donors can give whole blood, or opt to use a process called apheresis to donate specific blood components such as red cells, plasma, or platelets.
6. Donated platelets must be used within 5 days of collection, so new donations are constantly needed.
7. The body will replenish the elements given during a blood donation in times ranging from a few hours to a couple of weeks.
8. All donated blood is tested for HIV, hepatitis B & C



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