MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

JANUARY 2020

UPCOMING TRAINING OPPORTUNITIES

MASBO 2020 SPRING WORKSHOPS Click on the links below for more information and to register.						
DATE		BUDGET WORKSHOPS	REGIONAL WORKSHOPS			
Wed	Feb 26	Budget Workshop – Miles City Sleep Inn & Suites				
Thurs	Feb 27	Budget Workshop – <u>Billings</u> DoubleTree 27				
Fri	Feb 28	Budget Workshop – Bozeman C'mon Inn				
Thurs	March 5	Budget Workshop – Missoula Courtyard by Marriott				
Fri	March 6	Budget Workshop – Great Falls Heritage Inn				
Tues	March 10	*MTSBA/MASBO Budget Symposium - <u>Malta</u>				
Wed	March 11	*MTSBA/MASBO Budget Symposium - Glendive				
Thurs	March 12	*MTSBA/MASBO Budget Symposium - <u>Laurel</u>				
Thurs	March 19		Region 3 and Region 6 - Miles City Sleep Inn & Suites			
Tues	March 24	*MTSBA/MASBO Budget Symposium – <u>Kalispell</u>				
Wed	March 25	*MTSBA/MASBO Budget Symposium - Missoula				
Tues	March 31	*MTSBA/MASBO Budget Symposium - <u>Helena</u>				
Wed	April 1		Region 2 - Great Falls Holiday Inn			
Thurs	April 2		Region 5 – Billings "2905 "			
Wed	April 8		Region 1 – Missoula Courtyard by Marriott			
Thurs	April 9		Region 4 – Butte Copper King			

MASBO Board of Directors

Lorie Carey, Jefferson Co. High School President Region 1 Director Noreen Anderson, Hellgate K-8 Region 2 Director Belinda Klick, Sun River Valley Vice-President Rita Huck, Huntley Project K-12 Cindy Foley, West Valley K-8 Region 3 Director Cheri Nygard, Wolf Point Past President Kim Aarstad, East Helena K-12 Region 4 Director Kevin Patrick, Butte Schools Fiscal Agent Ex-Officio, MTSUIP **Denise Williams** Region 5 Director Rebekah Rhoades, Lewistown Ex-Officio, OPI Kara Flath Region 6 Director Jen Mettler, Baker K-12

MASBO Staff

<u>Denise Williams</u>, Executive Director <u>Marie Roach</u>, Administrative Assistant 406-461-3659

REGION DIRECTOR ELECTIONS TO BE HELD AT SPRING REGIONAL WORKSHOPS

Elections for Region Director for the term July 1, 2020 – June 30, 2023 will be held at the **Region 3** and **Region 6** spring workshop on March 16 in Miles City.

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.

DO YOU KNOW AN OUTSTANDING SCHOOL BUSINESS OFFICIAL?

MASBO is accepting nominations for 2020 Outstanding Business Official (click <u>here</u>). Co-workers, teachers, trustees, district administration, other school business officials, OPI employees, and county or state officials may nominate <u>a current, active MASBO member</u> (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 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, 2020.



LOL!

Gym companies on the 1st of January 2020:





P-Card purchases for nine months of the current rebate year (April - December) totaled over **\$20 million** with **147** school districts and special education cooperatives participating in the program. At the same time last year, we had 133 participants with \$16.9 million in total purchases. Click <u>here</u> to see the current year P-Card purchases report.

P-CARD PURCHASING IDEAS

Each year, districts that participate in MASBO's P-Card program earn a cash rebate based on total purchases during the period April – March. More purchases = more rebate! So what types of purchases are our members paying using their P-card? Here's some ideas: electric bill, maintenance supplies, uniforms, phone (land lines or cell) bills, Pitney Bowes lease payments, activities travel and lodging, internet service, online orders, if no fee is charged, fuel for vehicles, and garbage service.

FEBRUARY 3 STUDENT ENROLLMENT COUNT

<u>FY2020 Student Count for ANB Reporting</u> contains important information about the **spring (February 3, 2020)** enrollment count. **Read the entire memo**. Some important items to note:

- ✓ Ensure that student enrollment, attendance on official count dates, aggregate hours, and student demographic information is accurate and up-to-date in the AIM system. You may need to coordinate with others in your district to make this happen.
- ✓ In MAEFAIRS, you will import the minimum enrollment information from the AIM system necessary to determine your district's Average Number Belonging (ANB) for the 2020-21 budget year.
- ✓ An explanation of the "10-day rule" is on page 4. If you need to request approval of a variance to the 10-day rule, you must submit your request to the OPI *prior to the count date.*
- ✓ Click <u>here</u> to access the Reporting Instructions.

The Spring Enrollment count is due February 7, 2020. Please make every effort to meet this deadline.

The School Finance Division must issue FY2021 Preliminary General Fund Budget Data Sheets by March 1 and they cannot even begin to work on this until **every school district has submitted** enrollment counts in MAEFAIRS.

SCHOOL ELECTIONS

The regular school election day is May 5, 2020. 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.

- Candidates for a trustee election may file a Declaration of Intent and Oath of Candidacy (click <u>here</u> to access the form) between <u>December 12</u>, 2019 and March 26, 2020. The candidate for trustee must be registered to vote at the time the Oath is filed.
- County superintendents: please log into the County application and complete/verify district classification and board compositions for the 2020 school election season. Click here to see the Quick Reference Guide: County District Classification Collection.
- > Trustees must call for an election no later than *Tuesday, February 25* (70 days prior to election day).
- File the election resolution with the county election administrator 3 days after the trustees adopt it (no later than *Friday*, *February 28*).
- Running a mail ballot election? Make sure the Secretary of State's office receives your written plan, including timetable and sample instructions, no later than Friday, March 6.
- ➤ The **School Election Handbook** is posted on the OPI website.
- Click <u>here</u> to see the Elections Resources page, and click <u>here</u> to see the power point presentation used at the Elections workshops last fall.

MASBO ENDORSES THESE PROGRAMS



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



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



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

Andy Holmlund, Chief Executive Officer

406-457-4400 aholmlund@ms-sf.org

http://mustbenefits.org/



Montana Schools Unemployment Insurance Program **Theresia LeSueur**, Director

406-457-4407

tlesueur@mtsba.org http://www.mtsuip.org/



Payne West, Inc.

Montana Schools Property & Liability Insurance Plan **Rody Holman,** Program Manager

406-533-1035

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

IMPORTANT DATES & DEADLINES – FEBRUARY 2020						
December 12, 2019 – March 26, 2020						
Candidates for trustee election on May 5, 2020 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 Thursday, December 12, 2019 and Thursday, March 26, 2020. The candidate for trustee must be registered to vote at the time the Oath is filed.	Declaration of Intent and Oath of Candidacy School Election Calendar 2020				
FEBRUARY 1						
Self-Review of Meal Counting and Claiming System due	Complete the annual self-review of the meal counting and claiming system sometime during the school year before February 1 . Each school site must be reviewed where meals are served to students and counted for reimbursement. Maintain this documentation on file.	School Nutrition Programs Checklist School Nutrition Programs Administrative Update (see page 20)				
2 nd Afterschool Snack Program Review due	The School Food Authority must review each Afterschool Snack Program two times a year. The first review must be conducted during the first four weeks that the school is in operation each school year. The second review should be completed prior to February 1st. The reviews will be maintained on file at the School Food Authority.	Afterschool Snack Self Review Form Afterschool Snack Program Packet				
FEBRUARY 3						
Spring Enrollment Count Date	The official count day for 2020 Spring Enrollment is Monday , February 3 . To give district AIM staff the opportunity to verify and finalize enrollment data, the Student Count for ANB must be imported on or after February 3, 2020. You may import as many times as necessary. Student Count for ANB must be submitted to the MAEFAIRS system no later than Friday , February 7, 2020 . Extenuating circumstances for students who	A.R.M. 10.20.102 OPI Official Email ANB Memo Reporting Instructions AIM User Guide: AIM & MAEFAIRS Verification Step-by-Step Student Count for ANB Instructions A.R.M. 10.20.102(10)				
	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.					

IMPORTANT DATES & DEADLINES – FEBRUARY 2020					
FEBRUARY 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 (MAPS) log in page School Nutrition Programs Checklist Reimbursement rates for FY2020 FY2020 School Nutrition Payments			
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			
FEBRUARY 15					
First Semester Transportation Claims due	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. • TR-5 Claim for State Reimbursement for Individual and Isolated Transportation • TR-6 Claim for Reimbursement for School Bus Transportation	MCA 20-10-145(2) A.R.M. 10-7-104(1)(a) Regulations & Guidelines for Pupil Transportation Reporting			
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 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			
Trustees call for an election	At least 70 days prior to Election Day (May 5, 2020), 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 2020 School Election Calendar 2020 School Election Handbook (see page 6)			
FEBRUARY 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	FY2020 Payment Schedule (scroll to bottom of page State School Payments			

IMPORTANT DATES & DEADLINES – FEBRUARY 2020						
FEBRUARY 28 (continued)						
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) 2020 School Election Calendar 2020 School Election Handbook				

K-12 MONTANA

K12 Montana is Jeff Patterson's brand new educational technology leadership company. Jeff's been a leader in technology for education in Montana for over a decade. Beginning his education career as



Director of IT for an AA district, Jeff has extensive experience with districts and budgets of all sizes. His team has years of K12 experience. Prior to education, Jeff was a technology leader and senior manager in Fortune 500 companies.

K12 Montana's mission is to meet your objectives. We have extensive experience working with administrators, teachers, elected boards, students and parents. Look to K12 Montana, Inc. for support with thought leadership and strategic planning, budgeting and refresh cycles, technology levy planning, policy and procedures development, managed technology services including helpdesk, cloud strategies, disaster recovery and backup strategies, wired and wireless projects and custom solutions to meet the unique challenges of K12 education.

SCHOOL BUS DRIVER TRAINING

Saturday, February 22 (8:00 a.m. – 5:00 p.m.) in Bozeman

School Services of Montana (SSoM) is hosting an 8-hour bus driver training course for school bus drivers. This training can be used to fulfill 8 of the mandatory 15 hours of annual training as required in the 2018 Montana School Bus Standards (see Driver Inservice Training Program on page 55). Bruce Kubler from MAPT (Montana Association for Pupil Transportation) will be the instructor.



Click <u>here</u> for complete information and to register.

DON'T FORGET THIS . . .

MTSUIP/MTSBA ANNUAL HR SYMPOSIUM

Don't forget to sign up for the HR (Employment) Symposium offered by MTSBA and sponsored by MTSUIP. Locations and dates are shown below. Click here for more information and to register for a session.

February 4 – Malta February 12 – Whitefish February 5 – Lockwood February 13 – Helena Video Option – click here

FREE to MTSUIP member school districts and no limit on the # of attendees from the same member district. Non-member districts may also attend for a fee.

MASBO EXHIBITOR MEMBERS					
Aflac Rob Cook R_cook@us.aflac.com	AIG RETIREMENT SERVICES Michael Hart michael.hart@valic.com	American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com			
Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com	Edie Knoke Edie.barnard56@gmail.com	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com			
Bruco, Inc. Adam Uselman, V.PC.O.O. adambruco@gmail.com	C & C School Accounting David Bardwell Help@CandCSchoolAccounting.com	D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com			
Fatbeam ← NEW Graham Taylor graham@fatbeam.com	Fellon Insurance Services Dale Fellon fellonins@msn.com	Fisher's Technology Amanda Byrne info@fisherstech.com			
Frontline Technologies Elise Ozarowski eozarowski@frontlineed.com	Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	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	K12 Montana Jeffrey Patterson jeffp@k12mt.com			
Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com	Montana Public Employees Retirement Administration Terry Dalton tdalton@mt.gov	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org			
Montana Schools Unemployment Insurance Program (MTSUIP) Theresia LeSueur tlesueur@mtsba.com	Montana Unified School Trust (MUST) Andy Holmlund aholmlund@ms-sf.org	OMNIA Partners Bethany Tate bethany.tate@omniapartners.com			
Payne West, Inc./MSPLIP Rody Holman RHolman@paynewest.com	Pine Cove Consulting Brandan Bassett bbassett@pinecc.com	School Services of Montana Thomas Franta tfranta@mt-schools.org CHANGE			
Teachers On Call Maya Burnaugh mburnaugh@teachersoncall.com	TimeClock Plus James Baker marketing@timeclockplus.com	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com			
U.S. Omni 403(b) Retirement Savings Plan Administration Ryan Phillips rphillips@omni403b.com	Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.com	Felt, Martin, Frazier & Weldon, PC Jeffrey Weldon JWeldon@feltmartinlaw.com			
Wipfli LLP Kim Dare, CPA kdare@wipfli.com	GO FORTH AND BE AWESOME				



ELF FOR HEALTH PARTNER CHALLENGE

Grab a partner at work, at home or a friend and complete four weeks of working on your fitness, yourself, eating habits, and building comradery in the workplace. You and your partner will swap ideas and support each other over the 4 weeks to stay motivated, and meet new people if you participate as an office.

Monday—Send your buddy an email to help them with the challenges for that week. Ideas of things to include/attach: your own personal tips & tricks, inspiring words and/or images, a new, healthy recipe or workout to try.

Tuesday-Sunday—Any time during these days, check in with your buddy! For example, ask them if they tried a new recipe, workout, or had fun with any certain challenges. Feel free to tell them how you did with your challenges, too!

Source: init4thelongrun.com

ELF WEEK 1

MONDAY—Try a new smoothie recipe and add a handful of spinach

TUESDAY—Pick up a new book and read for at least 15 minutes each night

WEDNESDAY—Take 15 minutes to stretch and or foam roll after your workout

THURSDAY—Listen to a new podcast around a skill or topic you want to learn more about

FRIDAY—Try a new healthy dinner recipe and share it with friends or family

SATURDAY—Do a plank for 1 minute (or 2 if you're looking for a challenge)

SUNDAY—Digital detox



ELF WEEK 2

MONDAY—Gather a bag of clothes to donate to your local thrift store

TUESDAY—Stand (instead of sitting) at your desk for at least 2 hours or take 2 walking breaks during the day

WEDNESDAY—Journal for 15 minutes

THURSDAY—Try a new workout class or workout routine

FRIDAY—Write down 5 things you are grateful for today

SATURDAY—Call a friend you haven't talked to in a while

SUNDAY—Meal plan and prep for next week

ELFor WEEK 3

MONDAY—Share a healthy snack with a co-worker

TUESDAY—Get at least 8 hours of sleep tonight

WEDNESDAY—Donate this week's lunch money/coffee money to your favorite charity and pack a lunch

THURSDAY—Drink 2 full glasses of water before your AM coffee

FRIDAY—Unsubscribe from 5 emails you delete without openingyou can use a service to do this called **unroll.me**

SATURDAY—Bundle up and take your workout outside and get some vitamin D

SUNDAY—Take the stairs whenever possible



MONDAY—Find a way to pay it forward

TUESDAY—Park in a far away spot to get some extra steps

WEDNESDAY—Have a fitness date with a friend

THURSDAY—Add a new veggie (or two) to your dinner tonight

FRIDAY—Take some YOU time

SATURDAY—Create a new playlist to jazz up your next workout

SUNDAY—Write down 5 goals for the coming year